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

HCB Senior Grants Data Entry Manual

Adult Day
National Family Caregiver Support Program
Senior In-Home Services

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Welcome!

This is the data entry manual for SIH, NFCSP and ADS senior grants. All SDS senior grant programs enter client demographic data and service delivery into a database called Harmony for Aging (HFA) SAMS.

All SDS senior grant programs use the same database which allows one record per senior for grant services.

The program manager of the grant is your "go to person" for training and assistance with SAMS. If you have any questions, please call Cyndee Simpson-Sugar at 465-4798 or email at Cyndee.sugar@alaska.gov.

Let's get started!

Request Username

1. Each grant program is allowed on user. Request username and password information from the program manager by:

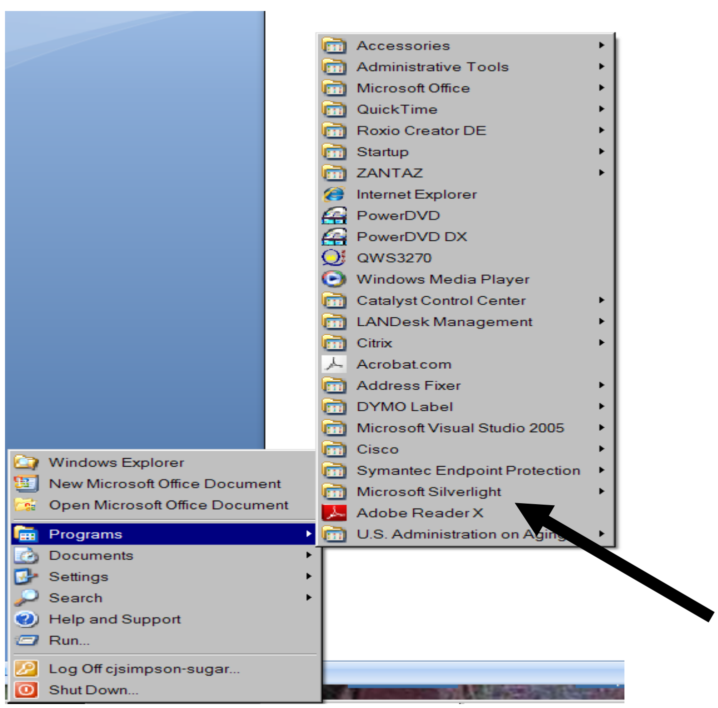
   a. **Submitting the SAMS Security Agreement** to the program manager.

2. The program manager will obtain a username and password for the Harmony for Aging (HFA) Portal and a second set for the SAMS software portion.

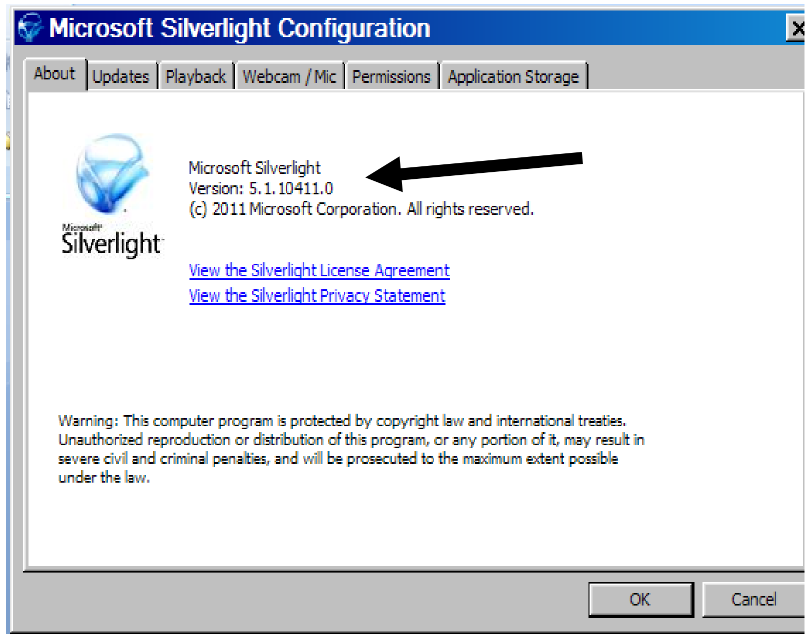
Microsoft Silverlight Plug-In

a. Your computer will need **Microsoft Silverlight 5.0 or higher plug-in installed**.
b. It may already be installed.
c. Here is how to check:

- Click on the **Start button**
- Open up **Programs**
- You will see **Microsoft Silverlight on the list**



- Open Microsoft Silverlight to see which version you have – it should be **5.0 or higher**



If you do not have the Microsoft Silverlight plug-in installed or need to upgrade to Silverlight 5.0 – go to www.microsoftsilverlight.com where you will be able to download 5.0.

Accessing the Harmony Portal

a. **Once you have received <u>two</u> 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) **Go to the Internet and enter the URL address**. It is suggested that you create a short-cut for your desktop. The address will be given with your username and password information.

2) The Harmony Portal login requires the login that starts with "ak" – and the temporary password - you will be asked to change it upon logging in for the first time. You will also be asked a set of security questions to be used for future identification when needed to reset your password.

Important Notice:
Approximately **every 40 days** you will be automatically **prompted to reset** your HFA Portal password –the username beginning with "ak."

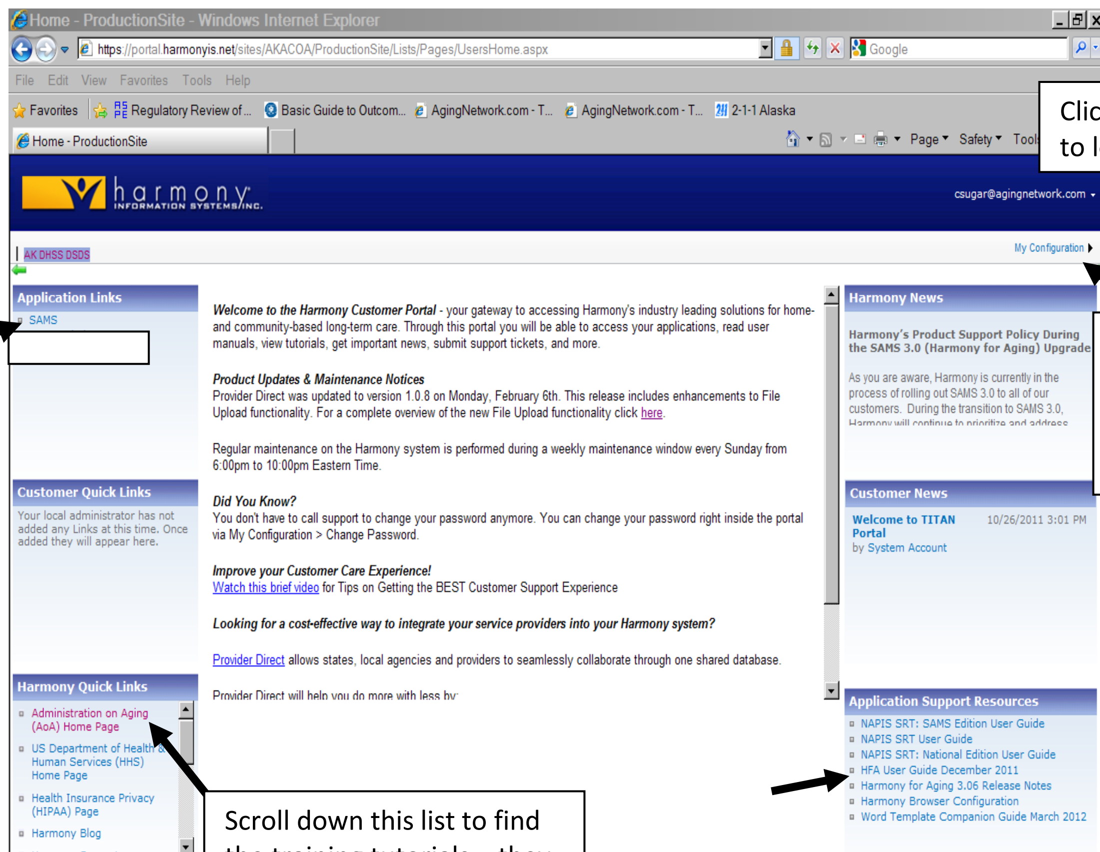
HFA Main Portal & SAMS Log in

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

a. **This is the Main Portal Page**
   There are **tools for training** and messages for upcoming events, etc. **see arrows and notes below.**

   1) click on **SAMS –** under Application Links for the application login window.

Main Portal Page



Click here to log out

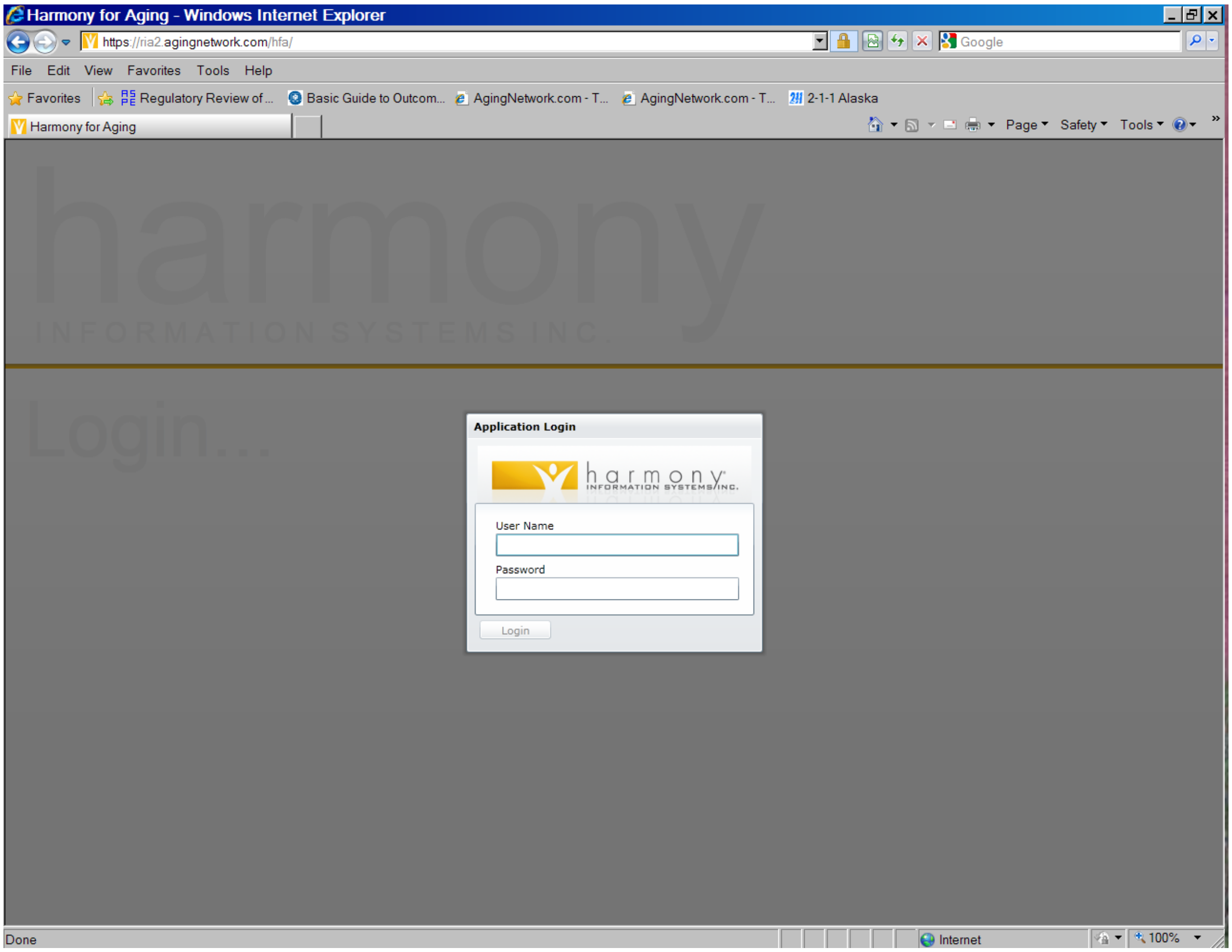
Click here to change your Portal password

Scroll down this list to find the training tutorials – they are great!

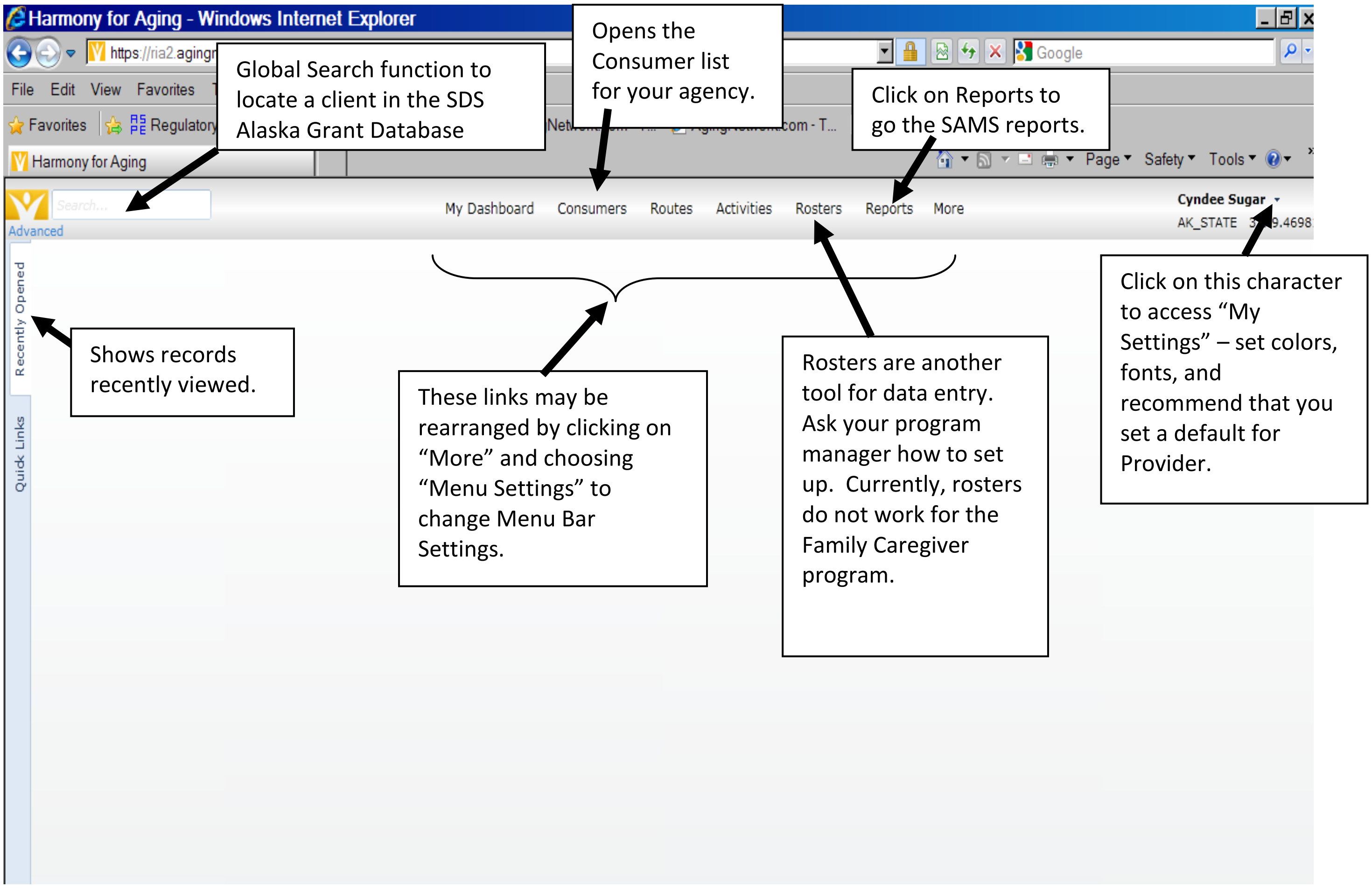
The HFA User Guide is the "master" guide – but is a very large document to print.

b. You should now see the database **SAMS Application Login window**

   1) Enter your username - it begins with your first initial
   2) Enter your password
   3) Click Login



c. This is the **SAMS application main navigation page**

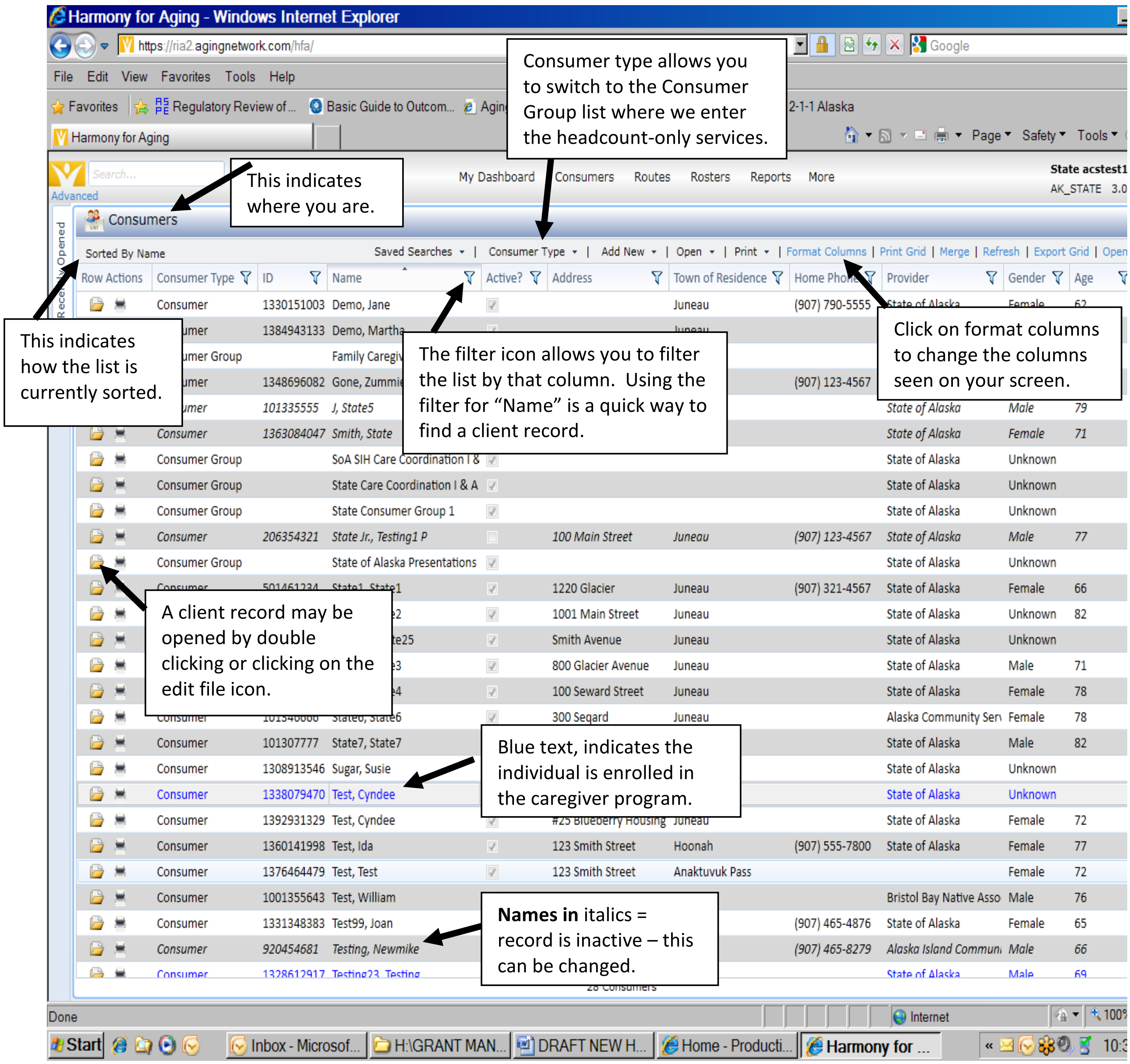


d. Consumer List

1) Click on the tab labeled “**Consumers**”

2) This is a sample Consumer list

The CONSUMER LIST

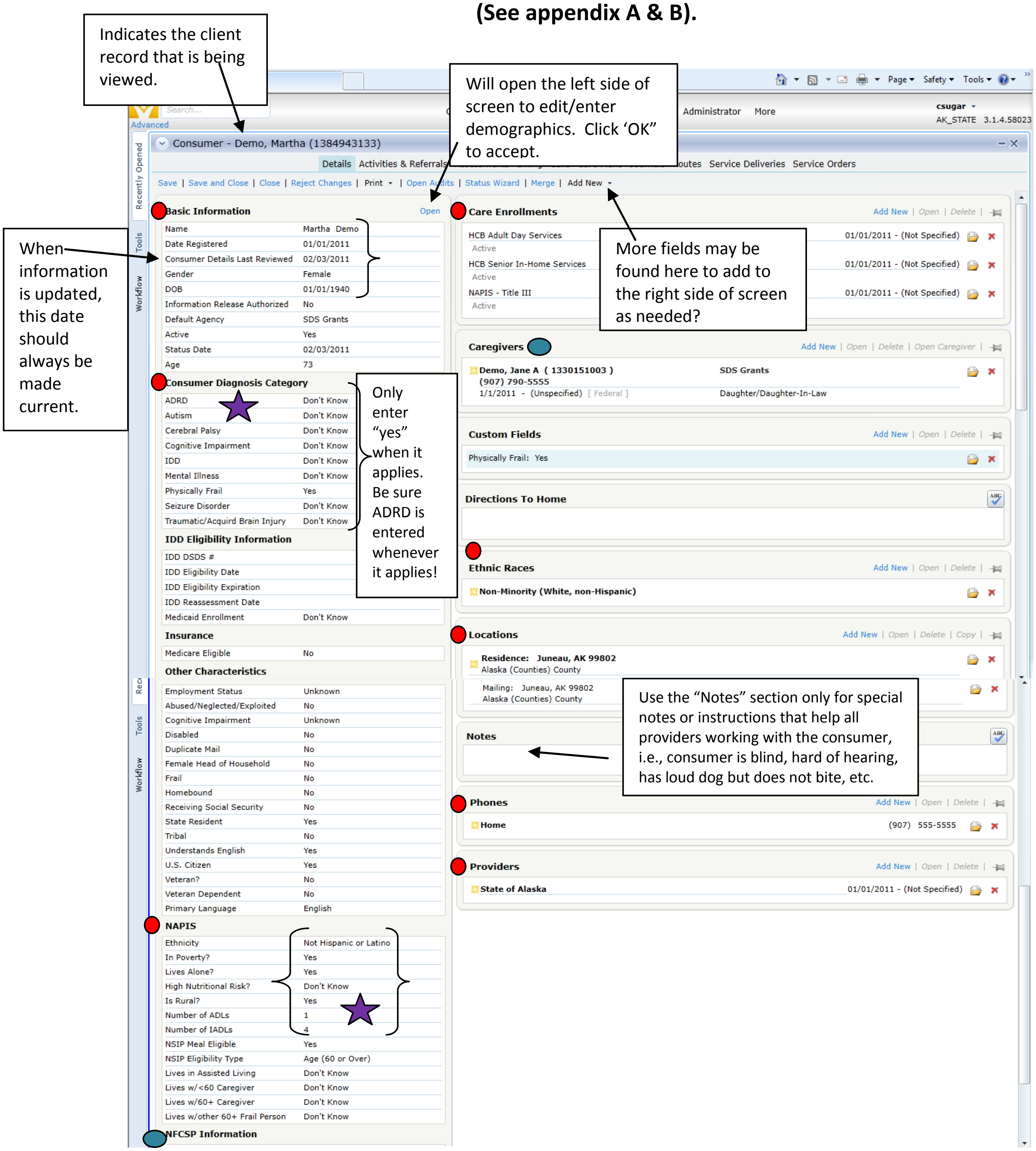


e. **Client Details –** Sections marked with a <u>Red Dot requires some data elements.</u>

f. Items marked with purple star must be updated at least annually.

g. <u>Items marked with blue oval are for the Family Caregiver program only.</u>

The required data elements correspond with the SAMS registration form – (See appendix A & B).



Registering a Client in SAMS

1. **Use the NFCSP or HCB SAMS Registration Form** as your guide for data elements to be entered. Each item on the form is required for the HCB programs, except, at this time there is no mechanism to enter the caregiver stress and health items for the NFCSP.

2. **Always SEARCH first** for a client in HFA SAMS 3.0
   - **SEARCH FIRST** – to avoid creating a DUPLICATE record. The database is shared with all senior grant programs STATEWIDE and many seniors are already in the system.
   - **Do not assume** that the client you just began serving is brand new to the database.
   - **Accidently created a duplicate record?** No problem. Please email with the SAMS ID# and client initials to the Program Manager so that a Merge or deletion may be done. This is very tricky when a Family Caregiver record is involved, so please be especially careful.
   - **For corrections, please do not email client names,** as email is not secure.

3. **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) Because **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.

4. **If the client was found in the search** – continue with the remainder of this section. If the client **WAS NOT found** in the search skip down to Step #5 "Registering a Brand New Consumer"

5. When the client is found in the Search
   a. choose their name from the list by double clicking or clicking on "open."
   b. Your screen opens up to their details and demographic information. Detail is highlighted on the menu ribbon across the screen.

6. **Review the screen shot in the page <u>above</u>** with red dots, purple stars, and blue ovals. Read the text boxes for valuable information.

   The items marked are required data elements and correspond to the SAMS Registration form for your program (Appendix A & B).

   Be sure to enter AND/OR update every item on the SAMS Registration form.

7. The LEFT side of screen:

- **Basic Information** (enter name, today's date for "consumer details last reviewed," gender, and DOB).
- **Consumer Diagnosis Category** (corresponds with Custom Fields) – Extremely important that they are entered. ONLY answer "yes" to those that apply - see table below for custom fields required for each program.
- **NAPIS** (enter Ethnicity, In Poverty?, Lives Alone?, Rural will automatically population and is based on zip code entered, and the number of ADLs and IADLs – enter "0" zero if none apply.
- **NFCSP Information** – enter "yes" to items that apply.

8. **The RIGHT side of screen contains fields:**

   a. **Care Enrollment - see table below:**
      - If the care enrollment for the program is already listed there is no need to enter.
      - If the care enrollment exists, but has an end date – it needs to be removed. Contact the program manager to delete the date.
      - If the Care Enrollment for the program needs to be added, see table below for information

   b. **Care Recipients – NFCSP program only –** linking a care recipient to the caregiver for the family caregiver program.

   c. **Ethnic Race –**enter the specific race(s) indicated on the SAMS registration form.

   d. **Provider –**enter your agency as a provider on the client's record. This may also be set as a default under "My Settings."

Care Enrollments by Grant Program

<table>
<tr><th>Grant Program</th><th>Level of Care</th><th>Service Program</th><th>Service(s)</th></tr>
<tr><td>Adult Day Services</td><td>Home & Community Based Programs</td><td>HCB Adult Day Services</td><td><u>Registered Services:</u>
HCB Adult Day Services

<u>Unregistered - Consumer Groups Only:</u>
HCB Adult Day Services Transportation</td></tr>
<tr><td>Senior In-Home Services</td><td>Home & Community Based Programs</td><td>HCB Senior In-Home Services</td><td><u>Registered Services:</u>
SIH Case Management
SIH Chore
SIH Respite
SIH Supplemental Services

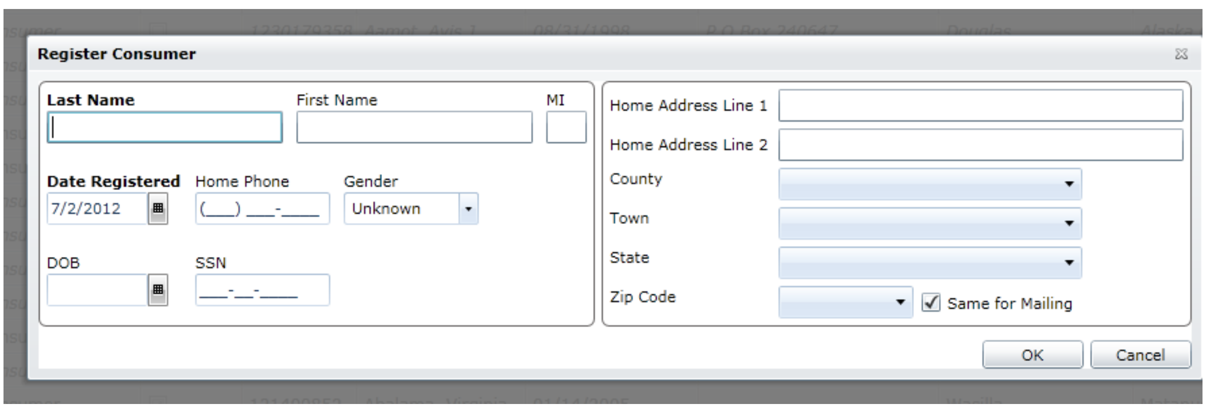
<u>Unregistered - Consumer Groups Only:</u>
SIH CM Information and Assistance
SIH CM Outreach/Community Education</td></tr>
<tr><td>National Family Caregiver Support Program</td><td>Federal Administration on Aging Programs</td><td>Family Caregiver Support Program – Title III(e)</td><td>See table below</td></tr>
<tr><td colspan="4">Registered Services = services to clients registered in SAMS. Services are entered/applied to a registered client's record
Unregistered Services = services to unregistered individuals or group activities and recorded in consumer groups. These services are NOT ever entered on a registered client's record.
<u>Note:</u> Registered services are only entered on a registered Client record and Unregistered services are only used in consumer groups. The services are never mixed.</td></tr>
</table>

Registering a Brand New Consumer

1. **<u>Use the NFCSP or HCB SAMS Registration Form</u> as your guide for the information to be entered**

2. **<u>Open the consumer list</u>**

- **Click on "add new" –** a window will pop up (see box below) and add the following
  - Last name
  - First name
  - Date registered – change this date to the first of the month services were delivered to the consumer. If consumer ISN'T NEW - leave the old dates there
  - Home phone
  - Gender
  - DOB
  - Home address
  - County – Alaska (Counties)
  - Town
  - State
  - Zip
  - un-check box if not same



Click "Okay"
The Consumer's Summary Screen will show again:

3. **<u>Go to Left side of screen</u>**
   a. It has populated the items that you have already typed. Scroll down the list and enter the two the following required elements:
      - Ethnicity
      - In poverty

   b. You made add email, etc. but it isn't necessary.

c. **Scroll back up to the top of this section and click on "OK"**
   - Note that it now says "Open"
   - If you need to go back into this section, just click on "open" again to open the section.
   - Don't forget to click on "OK" to close and accept any changes.

4. **<u>Now go to Right side of screen</u>**
   a. Locate field for "**Care Enrollment**" – click "Add New" (see chart above)
      - Level of care – Federal Administration on Aging or Home and Community Based depending upon the grant program.
      - Service Program you are enrolling the client in
      - Click "OK"
      - You are now back at the Summary Screen

   b. Locate field for **"Custom Fields"** – and click on "Add New" (see chart above)
      - Choose a custom field for the care recipient's condition – (see the program manual for your grant for the appropriate custom fields to enter,
      - click on "yes", or
      - click on "Add Next" to enter another – remember to answer "yes"
      - Click "OK" to accept
      - You are now back at the Summary Screen

   c. Locate field for **"Ethnic Races** – "Add New"
      - Choose what applies

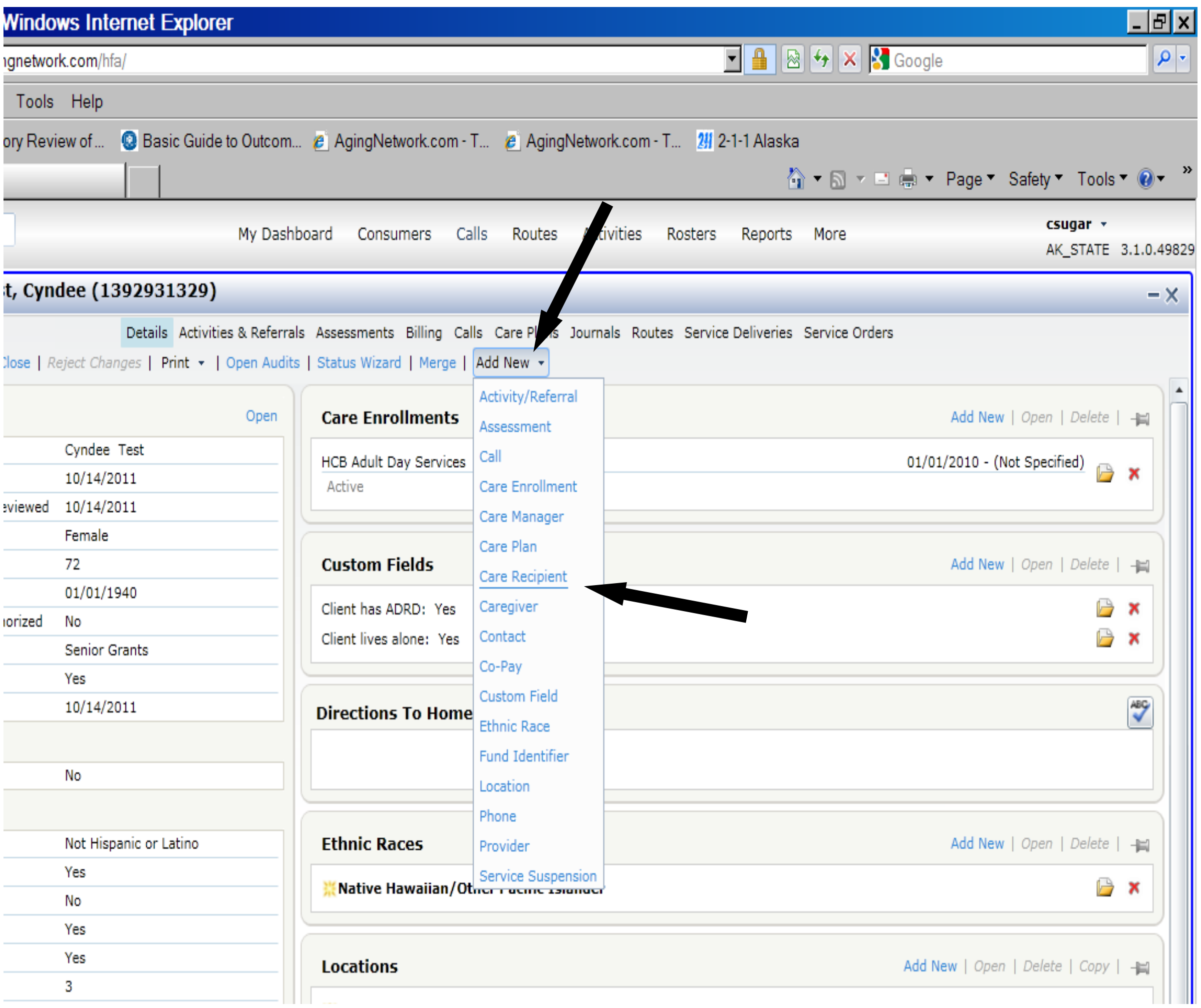
   d. Phones – add additional if needed – same steps as for the other fields you have added
   e. Providers – be sure your agency is listed – if now "Add New"
   f. **Save or Save and Close**
   g. Click on **Refresh** so the client will appear on your consumer list.
      (Note: if you receive a message that says you do not have the privileges please first check to see that you have entered a Care Enrollment for the program and your agency as a Provider and trying saving again. If you still receive the message, contact the program administrator for assistance.

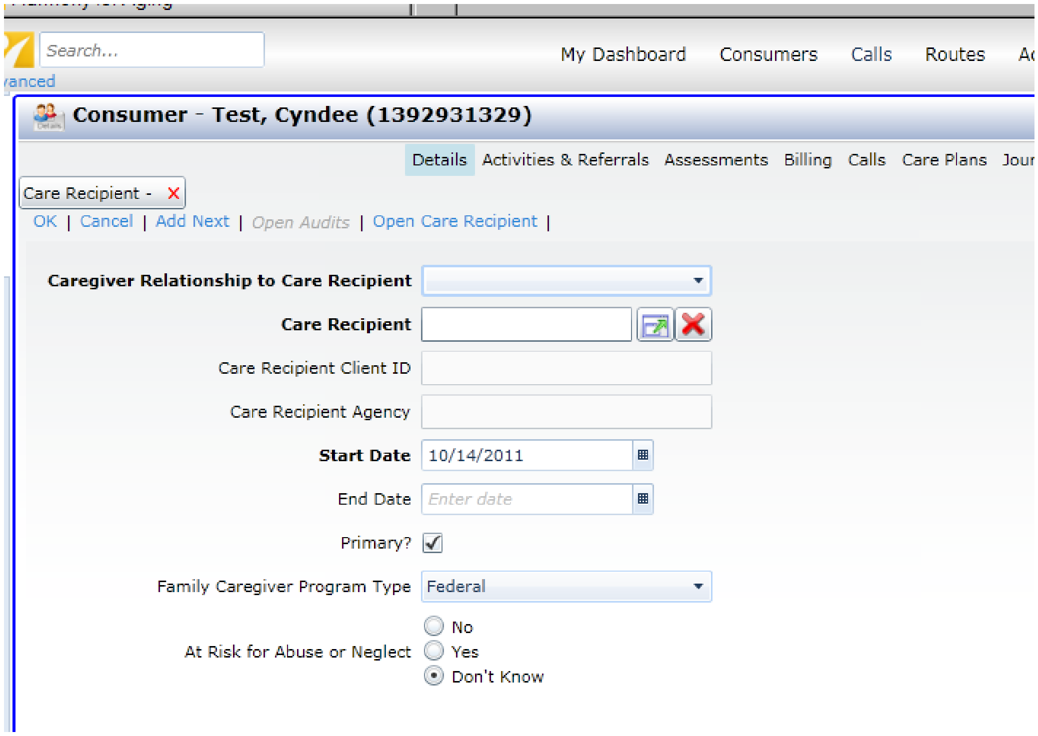
Now you are ready to enter service delivery <u>unless you are a NFCSP program</u>. If you are enter data for a NFCSP program see the next item.

NFCSP program only: Linking a Care Recipient to the Caregiver

There is one more client set-up item for the Family Caregiver Support programs before continuing with entering service deliveries. We must link the CAREGIVER and CARE RECIPIENT(S) in the CAREGIVER'S record.

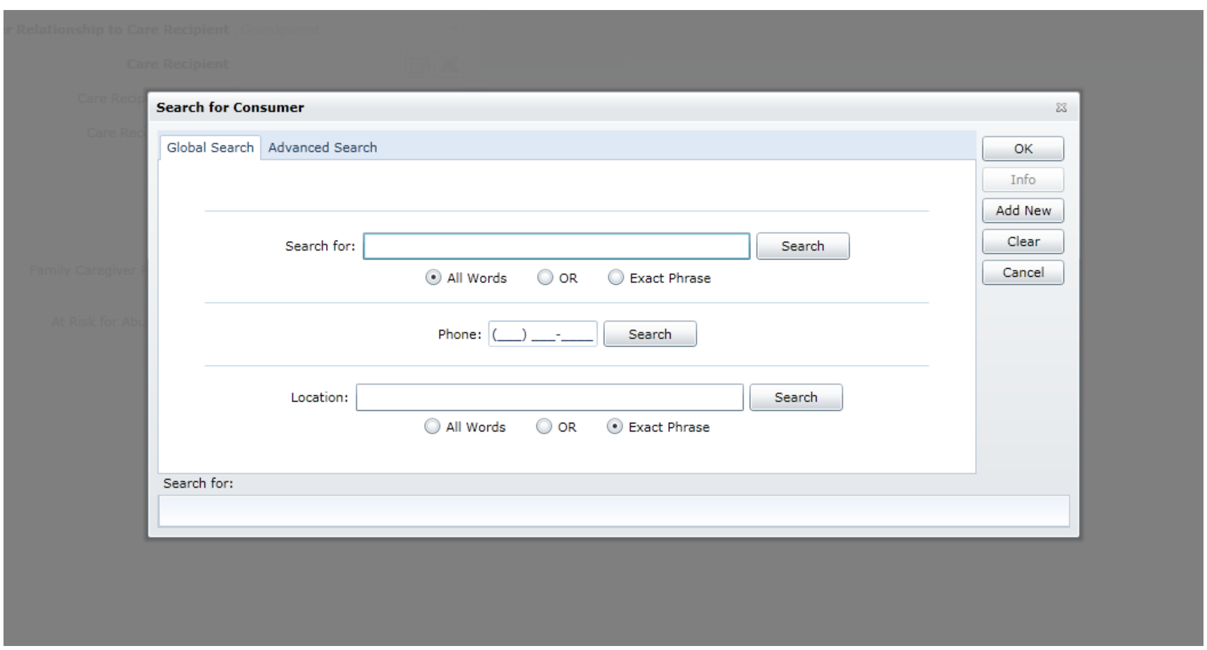
1. Open the Caregiver's record if you are not already there.
2. If you do not see a module box on the right side of the screen for Care Recipient, Click on the "Add New" drop down.
3. Select "Care Recipient" from the list





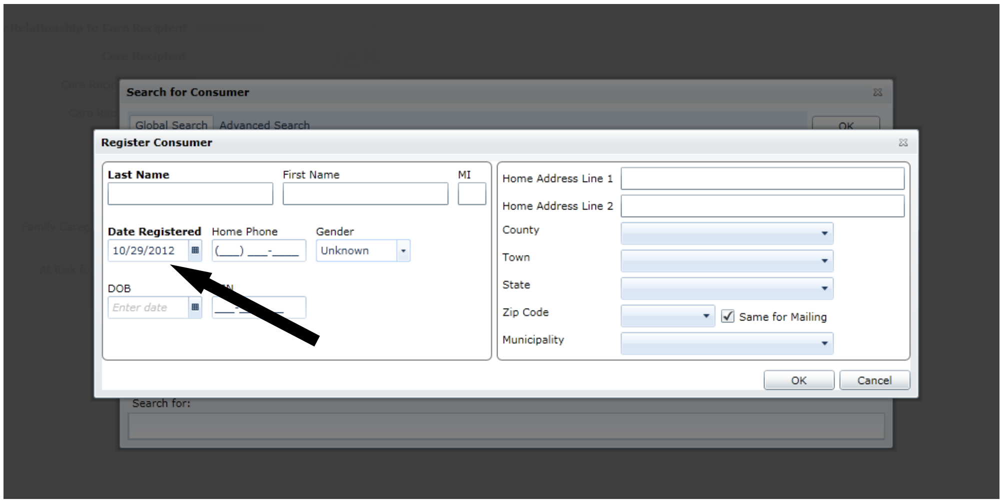
4. Enter the Caregiver Relationship to Care Recipient – choose item from drop down

5. Click on the box with green arrow to search for and choose the Care Recipient



6. Enter the Care Recipient's last name
7. Click Search for a list of possible choices
8. If the care recipient is already in the system, click on their name
9. Click OK

10. If they are not in the system, Click on Add New at right to enter them in the system. When adding a brand new individuals always **<u>BE SURE THAT YOU CHANGE the date registered</u>** to the 1st day of the month services began or you will not be able to link.



11. Enter the Care Recipient's
    - Name,
    - Change date registered,
    - Gender,
    - Town, and
    - State.

12. Click OK until you are back at the Caregiver's summary screen.
13. You should now see a field for Care Recipient filled in with the name of the Care Recipient.
14. They Care Recipient is now linked to the Caregiver.
15. Save.

Services at a Glance

Adult Day Services at a Glance

REGISTERED SERVICES – Use the HCB Registration form to collect required demographic information			
Services	**Unit**	**All Demographics Required**	**Notes**
HCB Adult Day	1 hour	**Yes**	Round to nearest .25 hour
UNREGISTERED SERVICES – Entered in Consumer Group Counts only – No Demographics Required			
HCB Adult Day Transportation (not field trips)	1 hour	No	Entered only when ADS grant funds are used for transportation or if ADS paid staff ride along when assistance is needed. Hours to and from program ONLY are counted. No field trip time counted.

Senior In-Home Services at a Glance

REGISTERED SERVICES – Use the HCB Registration form to collect required demographic information			
Services	**Unit**	**All Demographics Required**	**Notes**
SIH Case Management	1 per contact Add an additional contact when work goes into a second hour, and add additional for each hour thereafter.	**Yes**	Used for all case management contacts with client you will register and follow including information, assistance, referrals, assessment, plans of care, reassessment, ongoing contacts, any work you perform on their behalf, etc.
SIH Chore	1 hour	**Yes**	Round to nearest .25 hour
SIH Respite	1 hour	**Yes**	Round to nearest .25 hour
SIH Extended Respite	1 day	**Yes**	Count days
SIH Supplemental Services	1 per occurrence	**Yes**	Limited to $500 per household annually. –Must meet financial eligibility

Prior Approval required for supplemental services and to serve individuals under the age of 60.

UNREGISTERED SERVICES – Entered in Consumer Group Counts only – No Demographics Required			
Unregistered Consumer Group Services	**Count Consumers Served**	**Units**	**Demographics Required**
SIH CM Information & Assistance	# unduplicated served	Each contact w/an individual = 1 unit When contact is a few minutes or up to an hour Note: add an additional unit if the instance of contact goes into another hour	No
SIH CM Outreach/Community Education	# of individuals in attendance, mailing, potential reached	1 Activity or Campaign during month = 1 Unit (See the SIH Program Manual for specific examples)	No

NFCSP Services at a Glance

REGISTERED SERVICES – requires a CARE RECIPIENT be linked in each service delivery entry
Use the NFCSP SAMS Registration form to collect required demographic information

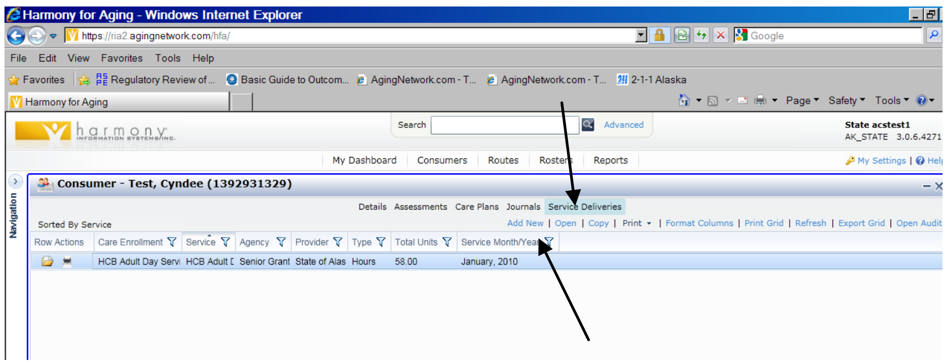
Service Category	Services	Unit	All Demographics Required	Notes
Access Assistance	1.a. Information & Assistance – **<u>ongoing</u>** caregiver assistance	1 per <u>contact</u>	**Yes**	Count an additional unit for each hour of contact
	1.b. Information & Assistance – **<u>little or no</u>** <u>follow up</u> **(may register, but may wish to count as unregistered when little or no follow-up will occur – see table below)*		*No*	
	2. Comprehensive Assessment		**Yes**	
	3. Case Management		**Yes**	
Caregiver Support	1. Counseling	1 per <u>session</u>	**Yes**	
	2. Support Groups		**Yes**	
	3. Training		*No- but may register. If registered enter name and town of residence at minimum*	
Respite	1. Respite In-Home	1 per <u>hour</u>	**Yes**	
	2. Respite Day Care			
	3. Respite Institutional			
Supplemental Services	1. Assistive devices, chore, personal emergency response systems, home-delivered meals, home security and safety, minor home modifications, and other.	1 per <u>occurrence</u>	**Yes**	
	2. Legal Assistance			

UNREGISTERED SERVICES – Entered in Consumer Group Counts only – No Demographics Required

Service Category	Services	Count Consumers Served	Units	Demographics Required
Access Assistance	1. Information & Assistance	# unduplicated served	1 per <u>contact</u> Note: count an additional unit for each hour of contact	No
Service Information	1. Outreach	# participants	1 per <u>group activity</u>	No
	2. Community Education	# participants	1 per <u>group activity</u>	

Entering Service Delivery

1. **Open the consumer's record** you wish to enter service deliveries on, if you are not already there.
2. **Click on "Service Deliveries"** from the menu ribbon. This will open the permanent list of service deliveries the client has received from your agency (if any). If the client is brand new – this screen will be blank.



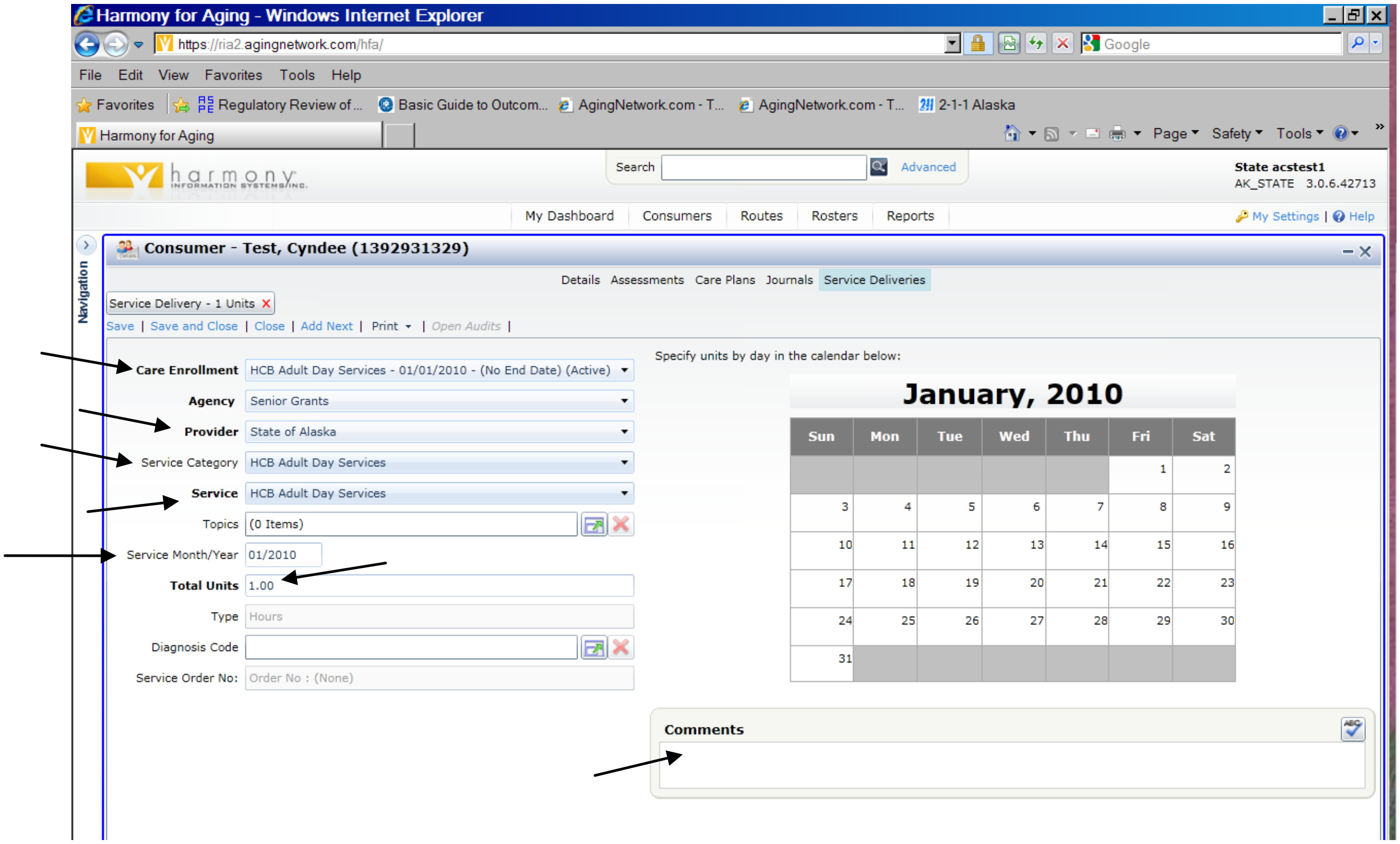
3. **Click on "Add New"** to open a blank service delivery record.
4. Enter a new month and year if you are entering service for a different month.
   - The calendar is used if you wish to enter daily units. Some adult day programs use this, but generally others do not as we enter the total sum of units for the month for the service we are entering. It is your choice.

5. The following items must be entered:

   ✓Care Enrollment,
   ✓Provider,
   ✓Service Category,
   ✓Service,
   ✓Service Month/Year, and
   ✓Total Units.

6. Comments may also be made in the box to the lower right, but are not required.
7. Save and Close.
8. Click on Add New to enter another service delivery or Close if there is no more to enter for this individual.

Service Delivery Entry Screen



I. <u>Short Cut for Entering Services When Service is the Same as previous month</u>

Open the client and go to their service delivery list:

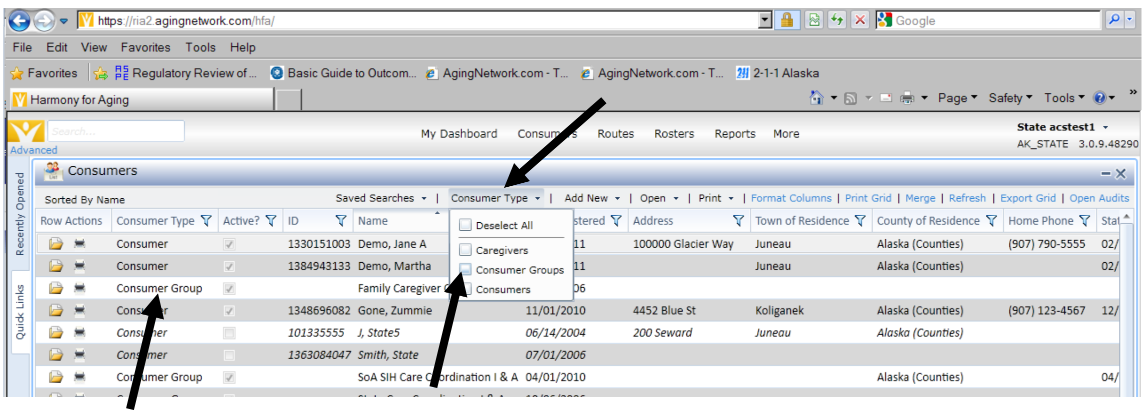
a. Highlight and right click on a service that you wish to copy to the next month,
b. Enter the correct month/year in the pop up,
c. The service delivery screen will be automatically populated, with the care enrollment, provider, service category, and service.
d. Check to be sure the correct month/year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

Consumer Groups

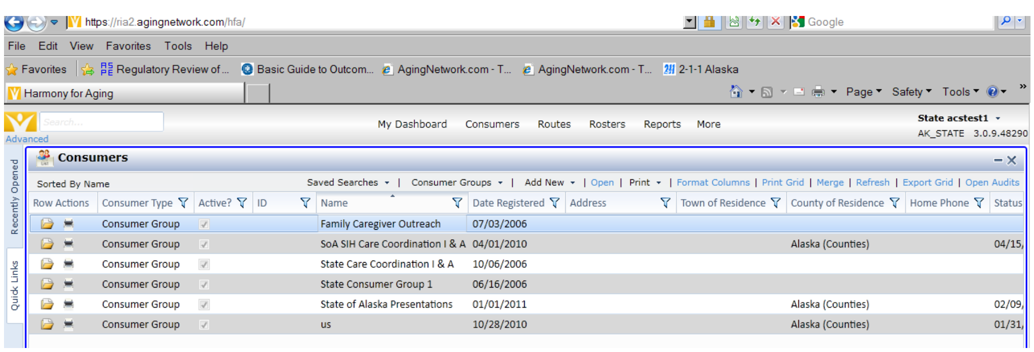
Consumer groups are used for entering unregistered services:

- head counts of I & A for <u>unregistered</u> consumers and
- activities such as outreach and community education.

a. Go to the Consumer List screen
b. If you know the name of the consumer group, Search for it
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 below)
g. A Consumer Group operates just like a client record – except different services are entered.



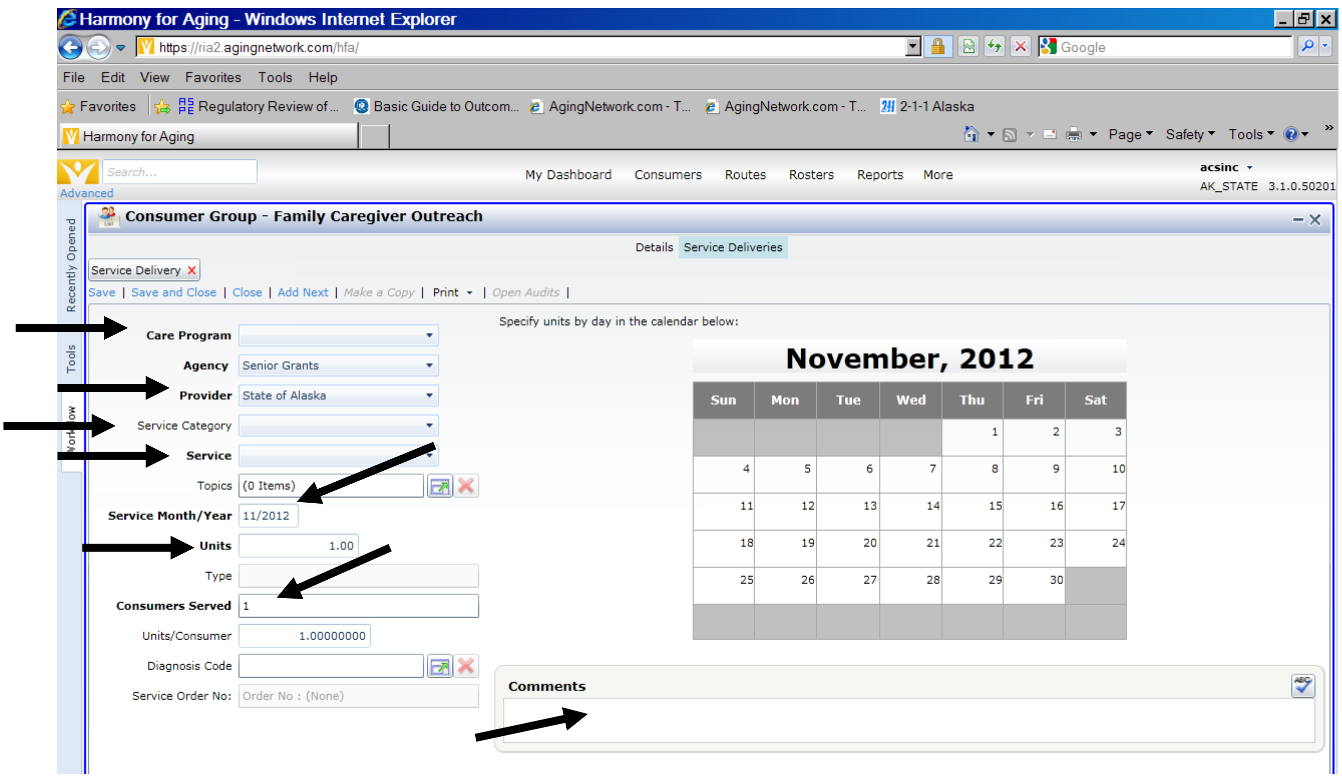
h. Open the Consumer Group you wish to post data to.
i. You will see the Basic information on the left and a care enrollment and provider listed on the right.
j. Click on "Service Delivery" from the page menu.
k. Click on "Add New" or highlight and copy a service.

l. Be sure the month is correct

m. The items to enter:

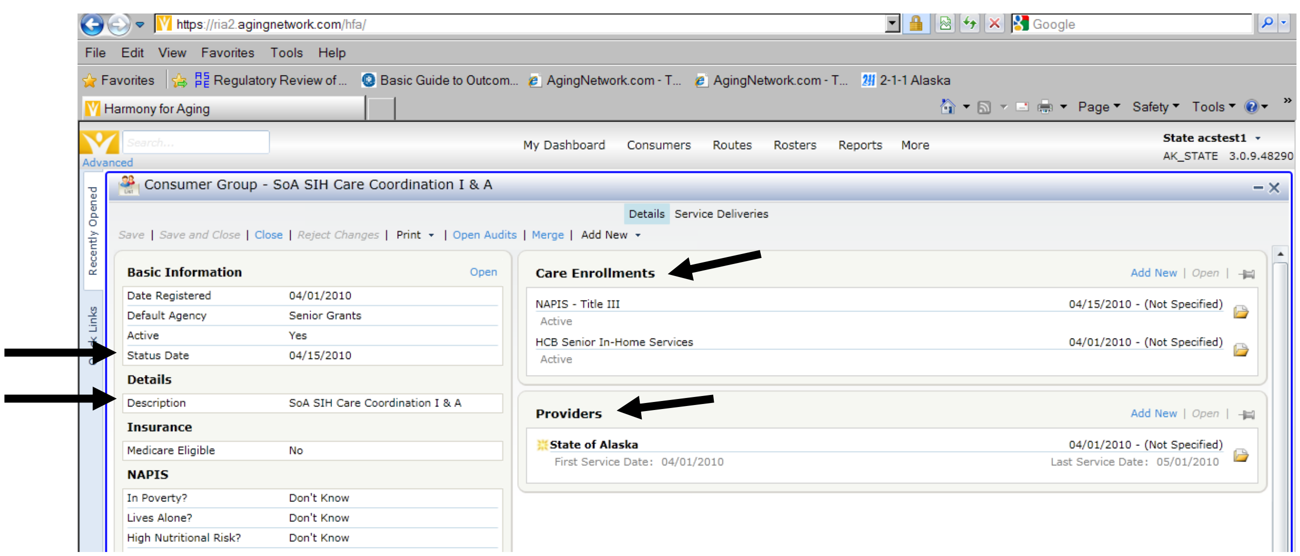
- ✓ Care Program
- ✓ Provider
- ✓ Service Category
- ✓ Services (be sure choosing correct services for a consumer group)
- ✓ Service Month/Year
- ✓ Units – contact units for I & A or 1 unit per activity for outreach or community education activities.
- ✓ Consumers Served – enter #serviced or who participated
- ✓ Comments – list outreach and community activities by date for the month

n. Save and Close.



Setting up a New Consumer Group

a. To set up a new Consumer Group
b. Choose “Add New” from the page menu and “Consumer Group” from the drop down.
c. The items that need to be added are:
   - 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

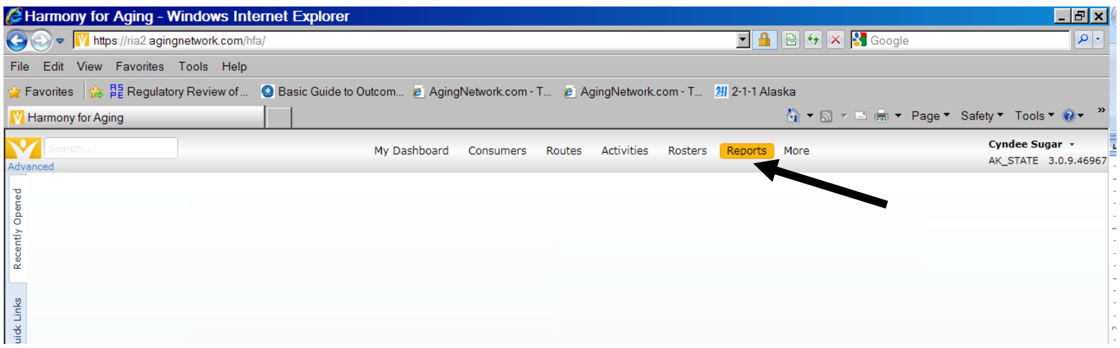


To return to your list of Consumers

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.

Reports

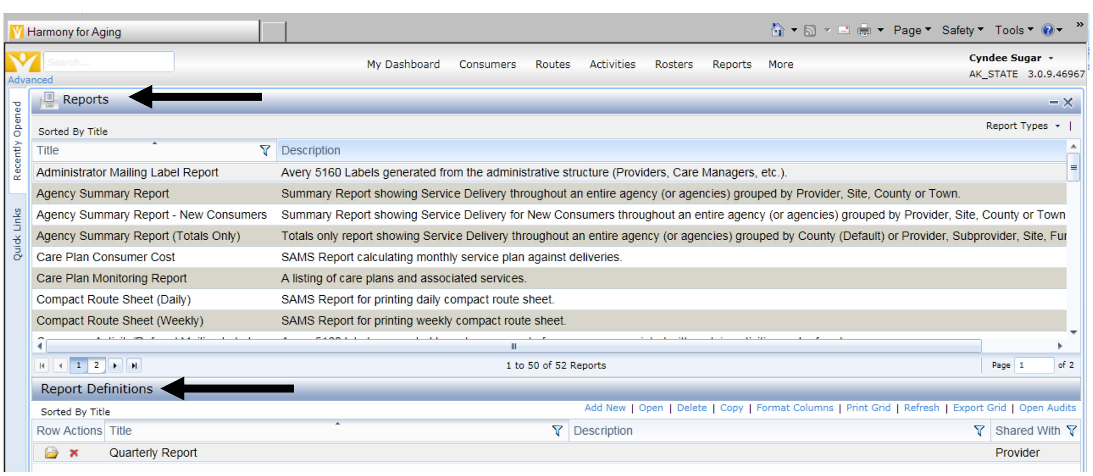
From the Main Screen, click on Reports



- There are many different types/formats of reports available.
- Service Reports are the format we use most.
- Service reports are based on a period of service delivery, such as a month or a quarter.
- The most common Service Report we use is the <u>Agency Summary Report.</u>

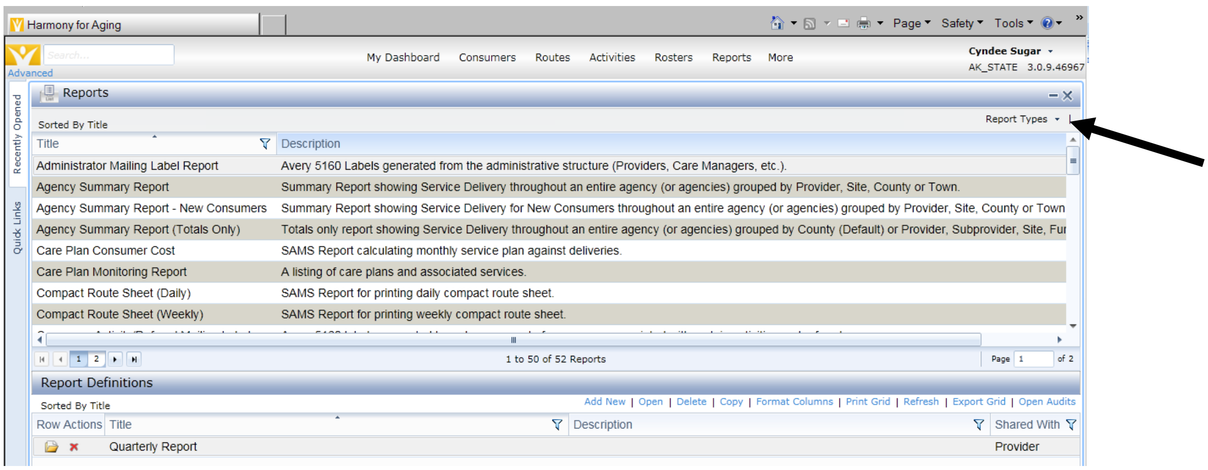
Running an Agency Summary Report

1. The screen is split into two halves:
   - **Reports** on top half (list of types/formats available) and
   - **Report Definitions** on the bottom half (definitions of the report type saved).

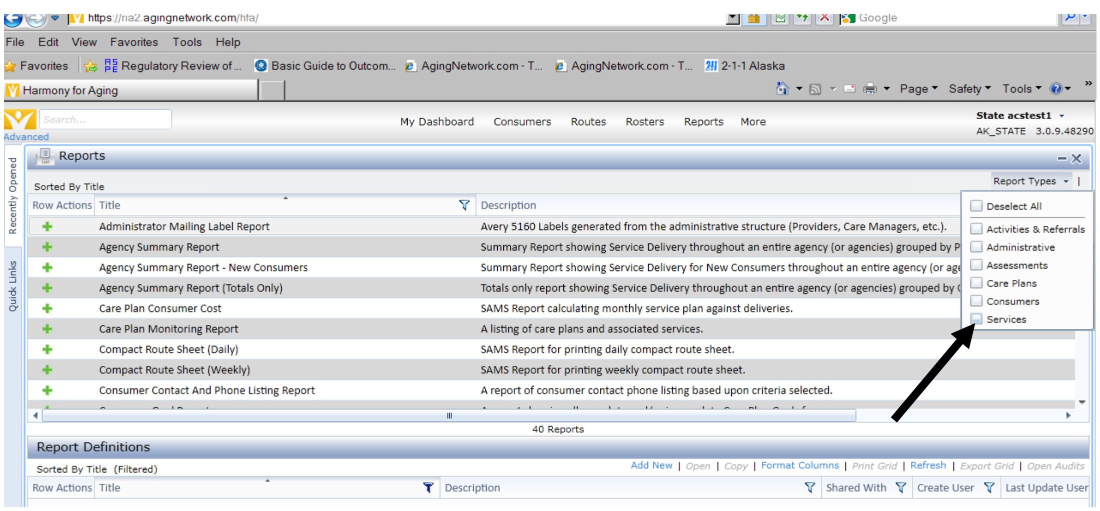


2. IMPORTANT - always be sure the correct report type/format is highlighted at the top, i.e Agency Summary Report, NAPIS Consumer Listing, Service Delivery Consumer Mailing Label, etc.

3. To find the Agency Summary type/format, scroll through the various reports on top list to find the Agency Summary Report **OR** filter the list to show only the Service Reports, and locate the Agency Summary Report.
4. **To filter the top list to Service Reports (I prefer this):**
   - Click on the drop down for Report Types at far right

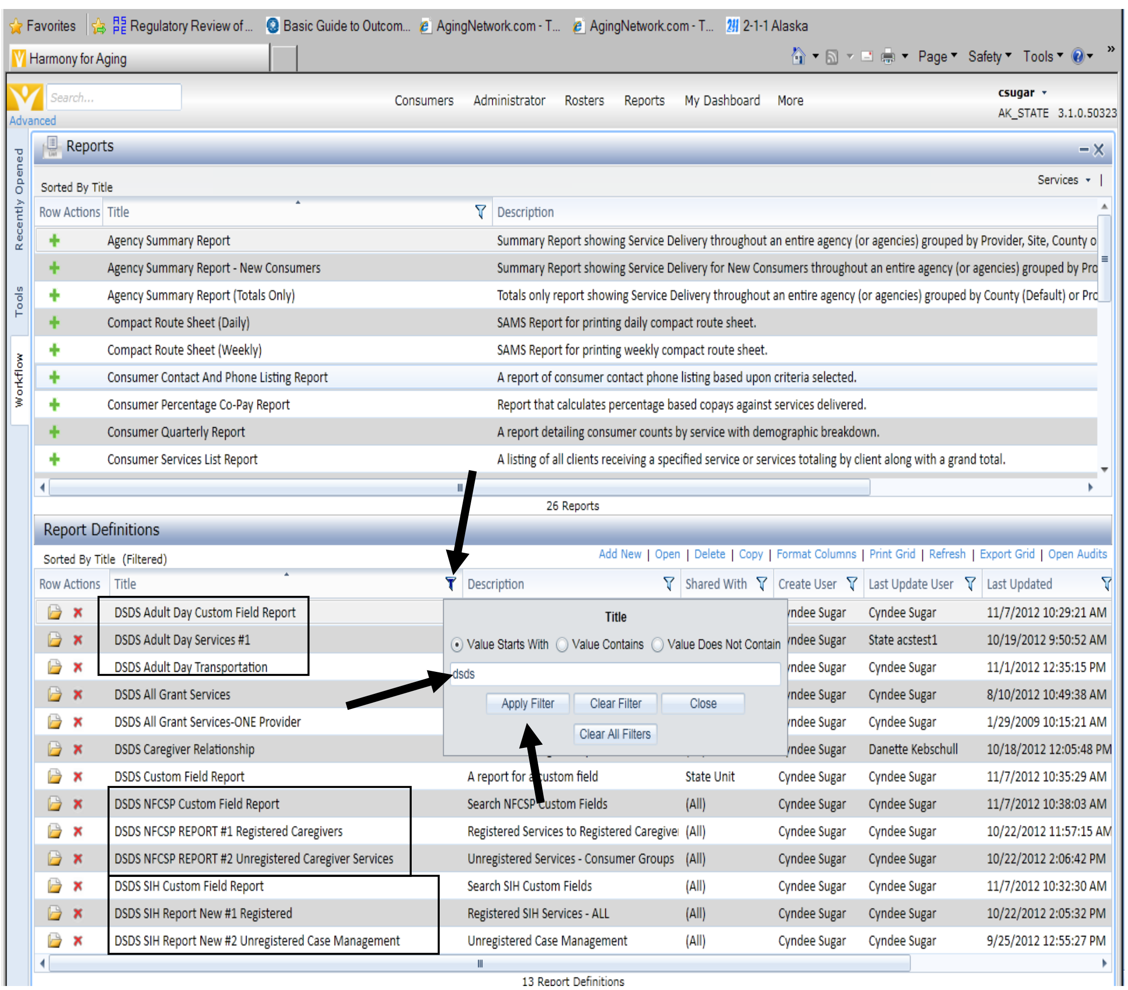


- Choose "Services" and the top will show only "Service" reports.



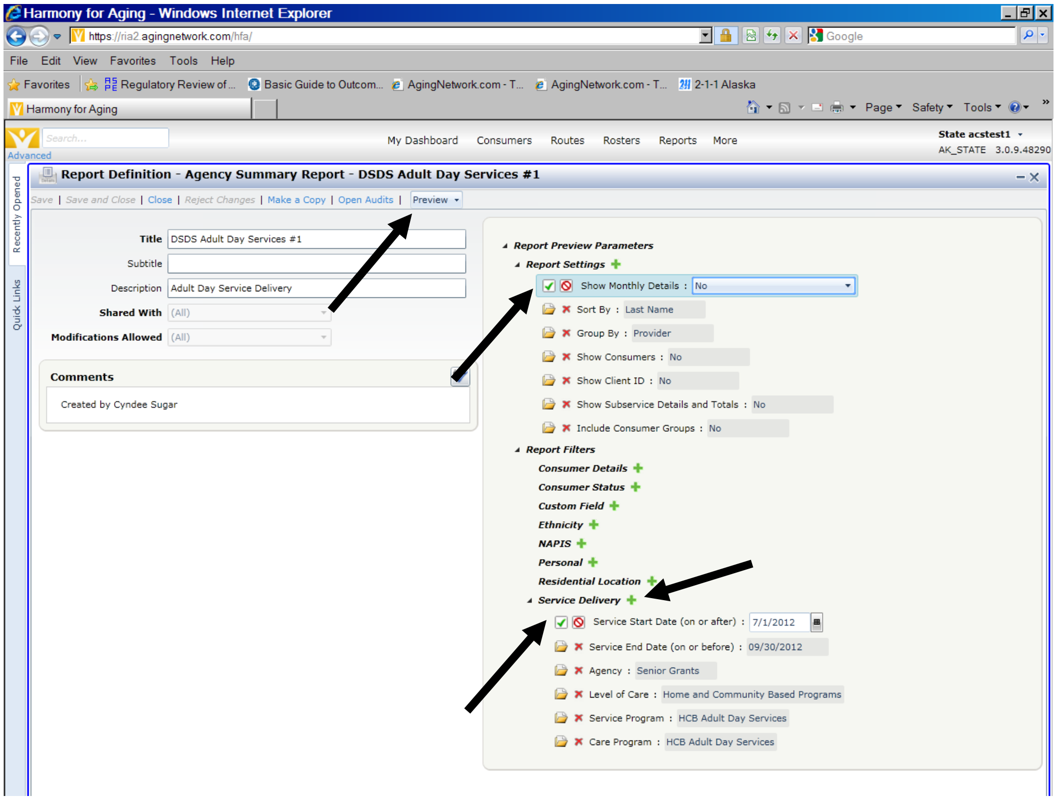
   - You should now see only the Service Reports and the Agency Summary Report is usually the first one.
   - If not, you may need to click on the triangle in the heading to alphabetize.

8. **Highlight the Agency Summary Report** on the top list
9. At the bottom – there will be a large list of reports defined in the agency summary format.
10. Let's filter this list so that we may find our reports quicker.
11. Under Report Definitions (bottom list**) in the column heading for the "Title",** click on the icon.
12. **Enter DSDS, there ais a set of reports created for each program.**
13. **Click apply filter**
14. This will sort the list of "Report Definitions" and the bottom half of the screen to show only the reports that **begin with DSDS**. *Reminder: the filter will remain until it is cleared.
15. The Titles in boxes below are the most commonly used reports for each program that have been preset.



16. Double click to open a Report Definitions you wish to run.

17. The Report Definition screen opens. The report Definition is where we indicate what data to pull (query) from the SAMS database and how we want it to print.



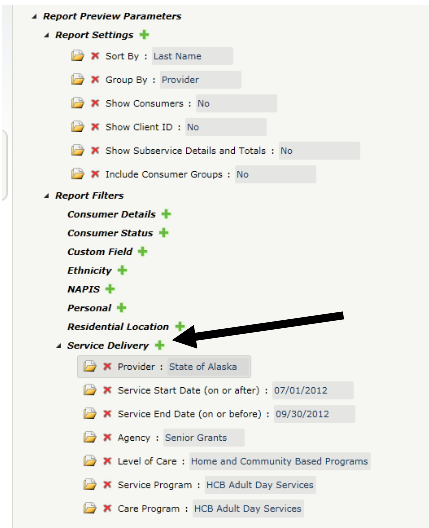
18. The left side shows the fields for Title and Description
19. The Right Side is where to indicate the parameters to query and print. For example:
    - **Report Settings** (towards the top) is where we can choose how it is sorted or what is displayed, i.e. consumer names, monthly details, etc.
    - The **Service Delivery** section (towards the bottom) is where we indicate a service date range, provider, and what program and/or services to query.
    - Click on the **green plus sign** **+** for more items to specify.

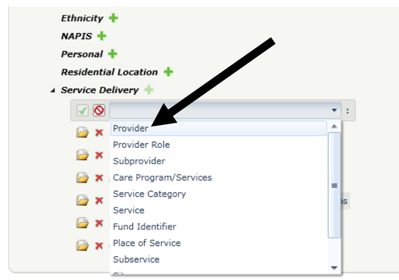
20. The parameters have been preset for the DSDS ADS, SIH and NFCSP report definitions indicated in the boxes above – you will need to **set or reset** the following:
    - Service Start Date
    - Service End Date
    - Provider
    - *All other settings have been preset and unless changed and saved by another user, should be ready to go.*

21. Click on the **file folder icon** to edit an item.

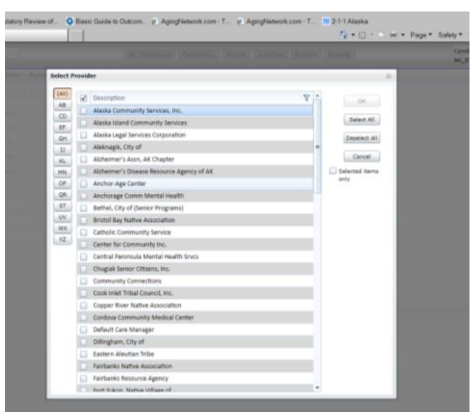
22. IMPORTANT, if there is ever a **<u>green check mark ✓visible</u>**, it must be clicked to accept the change or report will not run correctly.

23. To **indicate a provider** click on the **green plus sign** + after **"Service Delivery**" and choose "Provider" from the list.



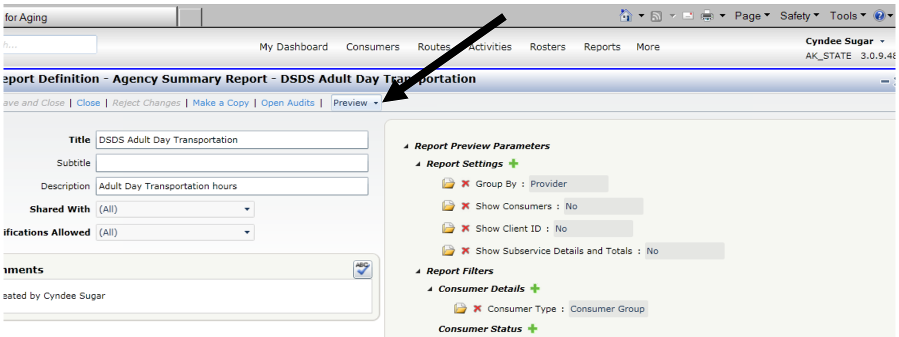


24. Another window opens for you to indicate the provider. Choose the Provider.

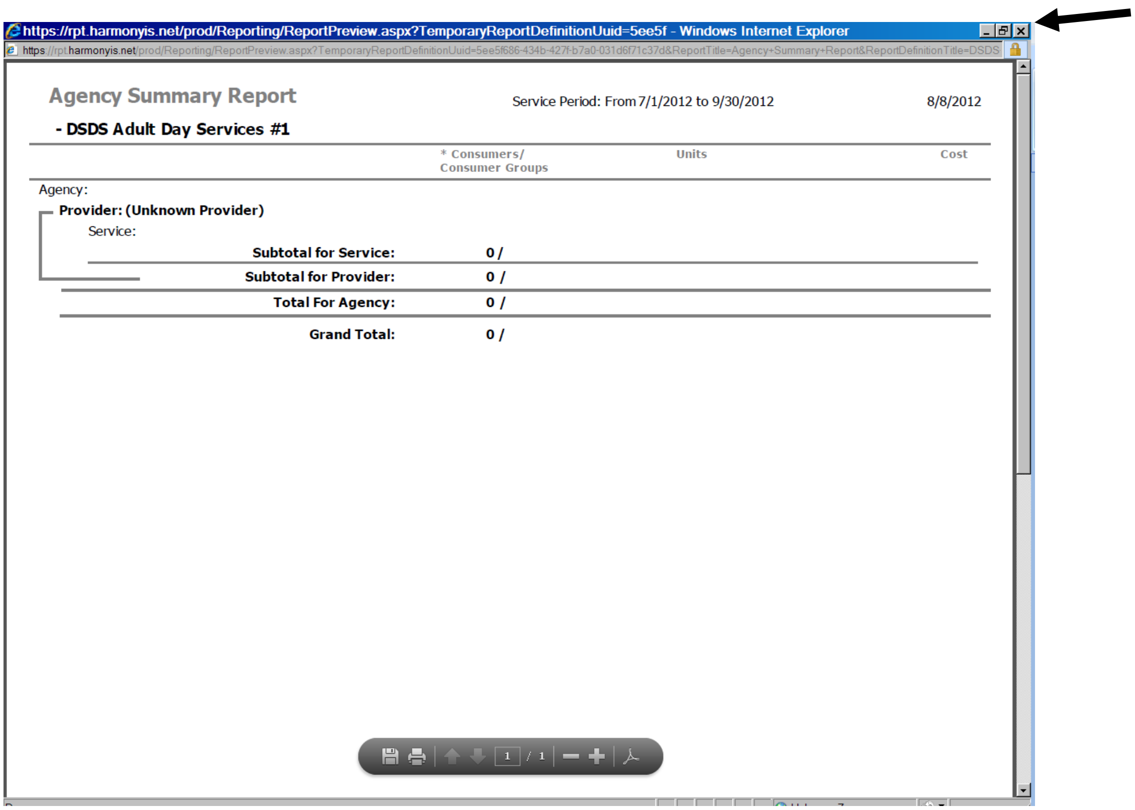


25. Check the box for the provider
26. Click okay.

27. Click **"Preview"** and wait for the report to appear in Adobe Reader. The example below shows zero, but your report should show services and numbers served. The example shows zero.

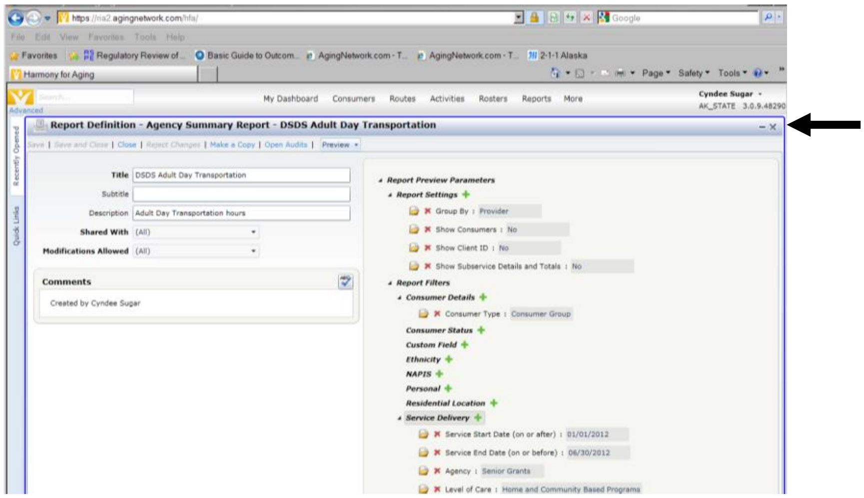


28. Your report will appear something like this, but with numbers:

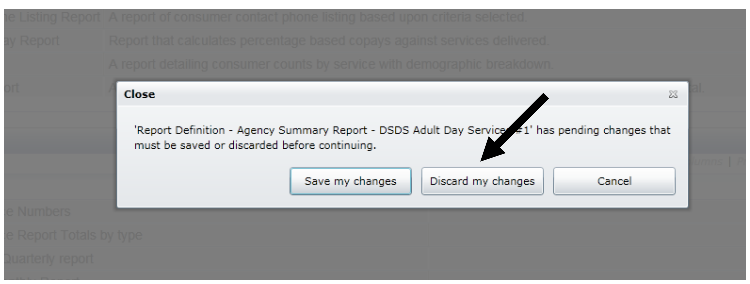


29. The **bottom center** of the Adobe screen has icons to print, etc. These fade away in a few seconds. To make them reappear, move your mouse to the bottom center of your screen.
30. Click on the "**X" at top right (see arrow above)** to make the Adobe screen disappear. If you need to reset a parameter on the Report Definition screen you can do so and click Preview again.

31. Once finished – **click on the page “X” in the blue banner** to close the Report Definition.



32. You will be asked to save or discard changes, please “**Discard my changes”** as this will reset the parameters for the next user.



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. You will need to update the filter on the title heading to the agency name or acronym you are using.

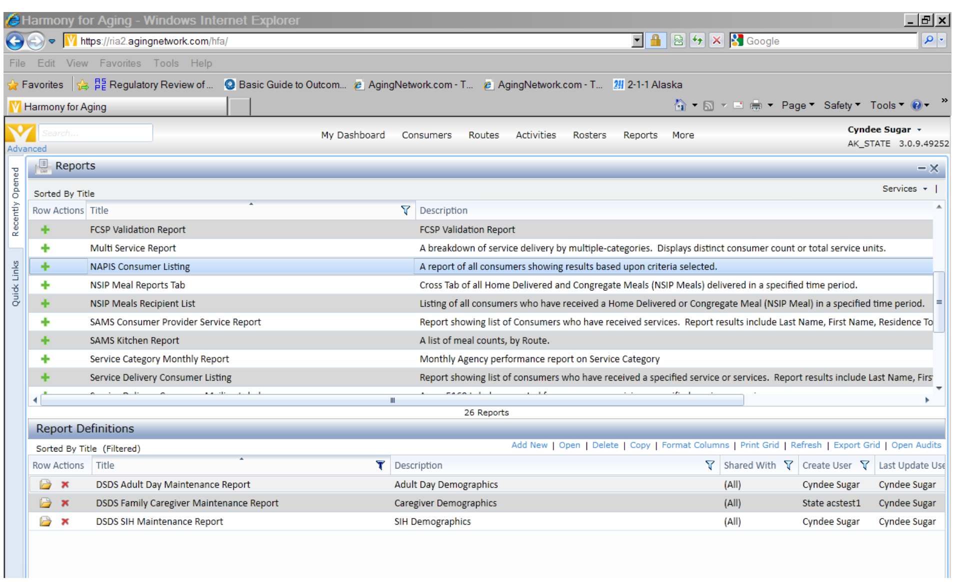
NAPIS Demographic Check Report - Run each quarter

The following NAPIS Reports have been created so that a report can be run to see if the majority of demographic information has been entered.

To run these reports:

a. Click on Reports
b. On the top half of the screen "Reports," locate the report template called "NAPIS Consumer Listing"
c. Highlight it
d. At the bottom half of the screen "Report Definitions" you find three report definitions
e. Choose the report appropriate for your program
f. Open the report
g. Set the service start and end dates
h. Choose your agency as the "provider"
i. Click on Preview
j. Consumers missing data will be displayed.
k. The items that have a dash in them or are blank are missing.

Note: if the "high nutrition risk" field is not entered, consumers will also show on this report. We do not use this field for the ADS, SIH, or NFCSP, so do not be alarmed if multiple names show – it may be because of this.



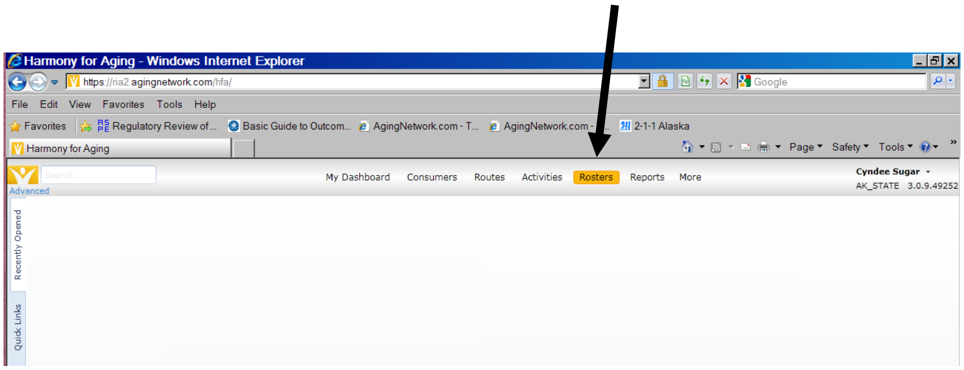
A copy of this report may also be made for your agency – see previous section for steps.

Rosters

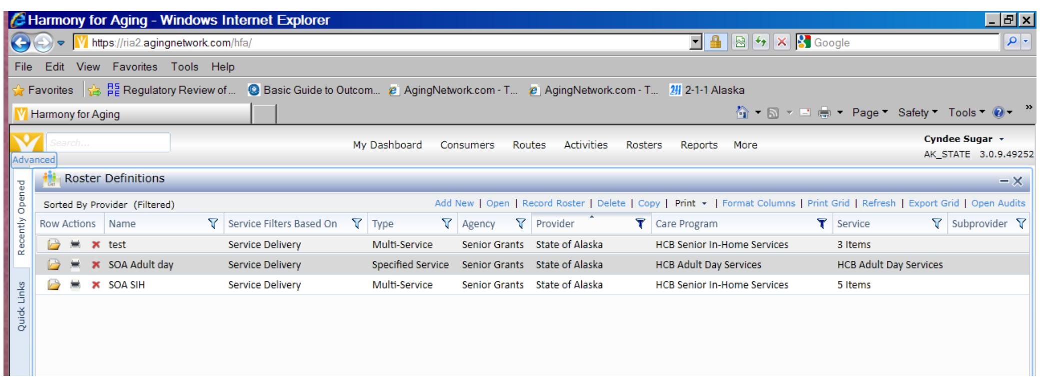
Rosters are a tool that filters your consumers by program and services all to a single screen for quick data entry. Currently rosters do not work for the National Family Caregiver Support Program, but it is expected that they will be available in the future.

To set-up a roster for data entry:

a. Click on Rosters



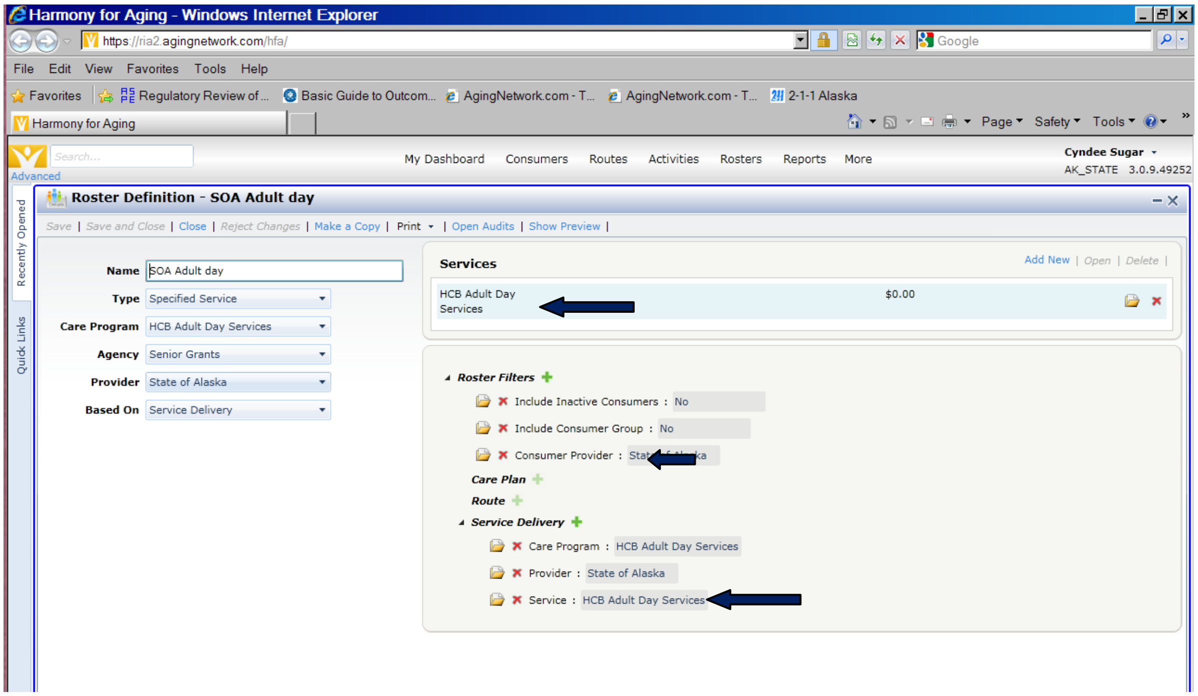
b. You will either see a blank screen or rosters that have been defined for your agency



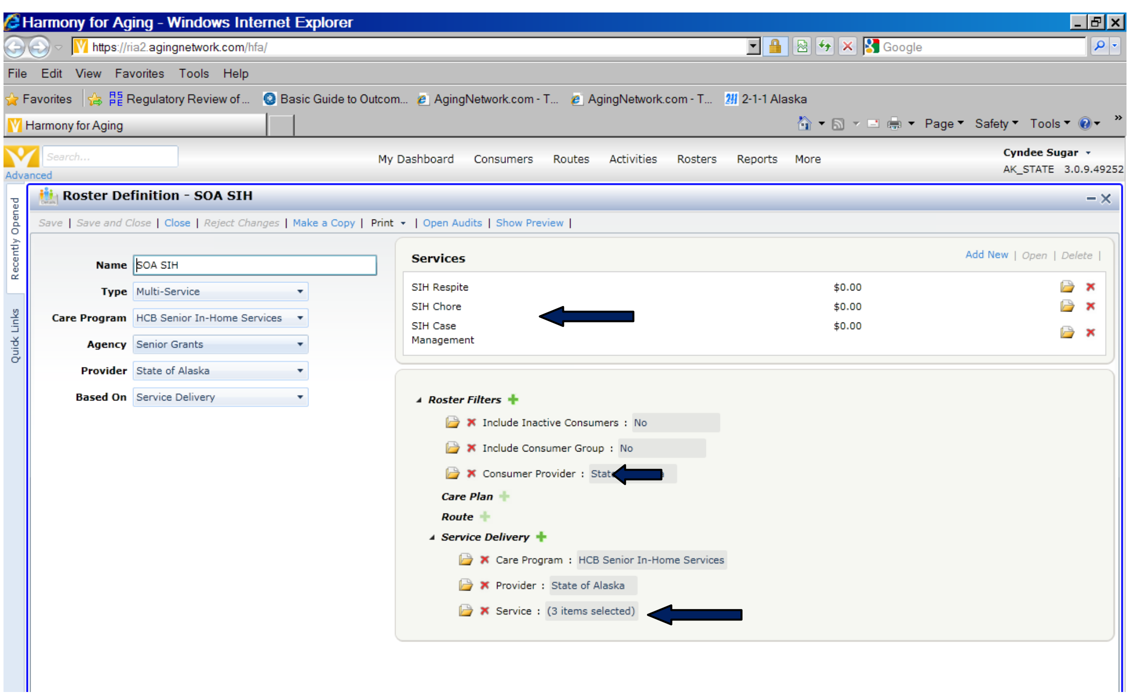
c. If you see a roster for your program and services, double click on the Title to open the definition.
d. The parameters are set so that consumers connected with the particular program and its services will be pulled to the Roster.

e. The following items must be set for the Roster to display correctly – note that the Services must be indicated in two places and the Consumer Provider is used rather than "default provider."

Adult Day Roster Definition:



Senior In-Home Roster Definition:

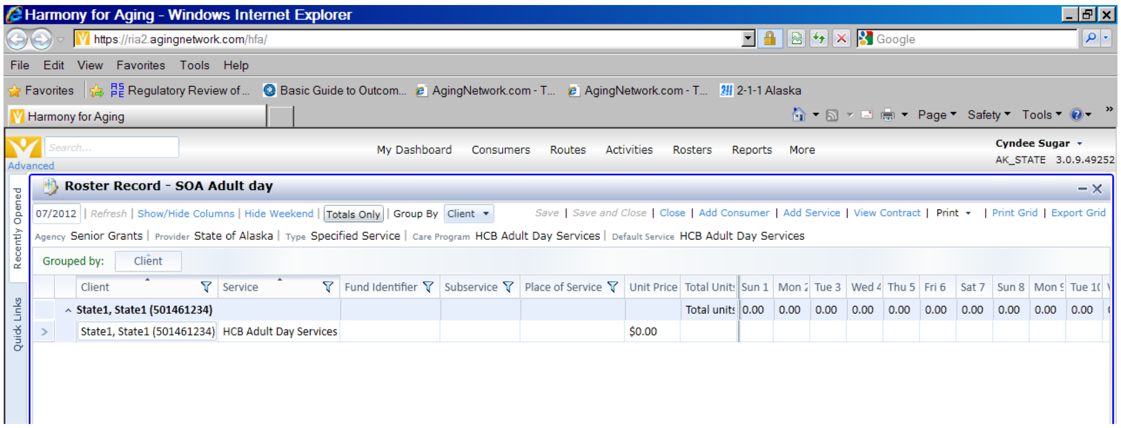


f. Once the Roster definition is set save and close.

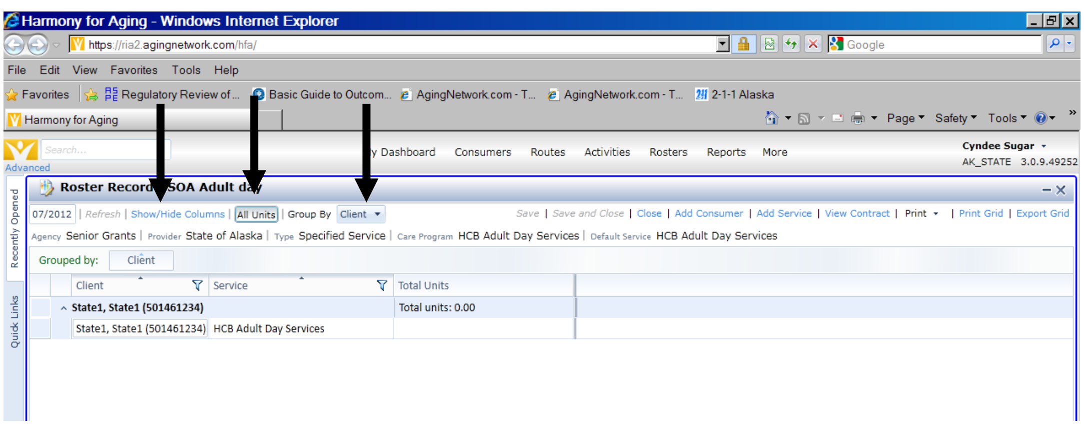
g. **Highlight the Roster title**, be careful not to open

h. Click on “**Record Roster”**

i. The consumers with the care enrollment of the program will populate the roster. This may take a few minutes.

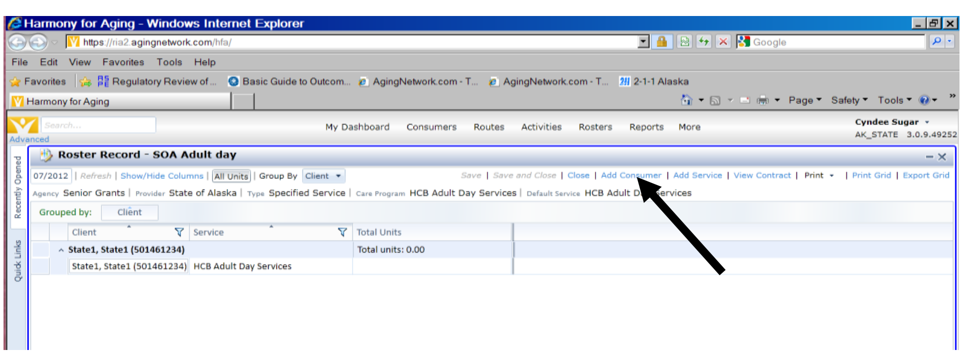


j. The roster displays certain fields and may be sorted a variety of ways to suite your style. For example:



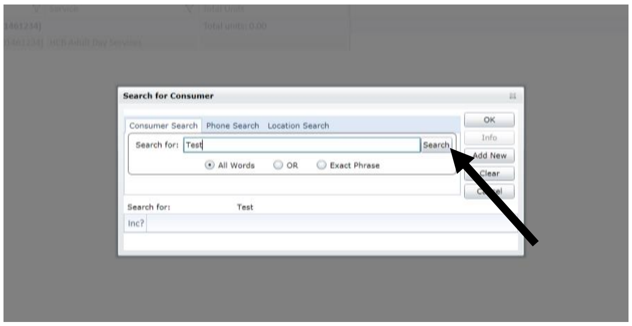
k. To add a new consumer to the roster, the consumer must first be set up in SAMS and have the care enrollment of the program entered on their record.

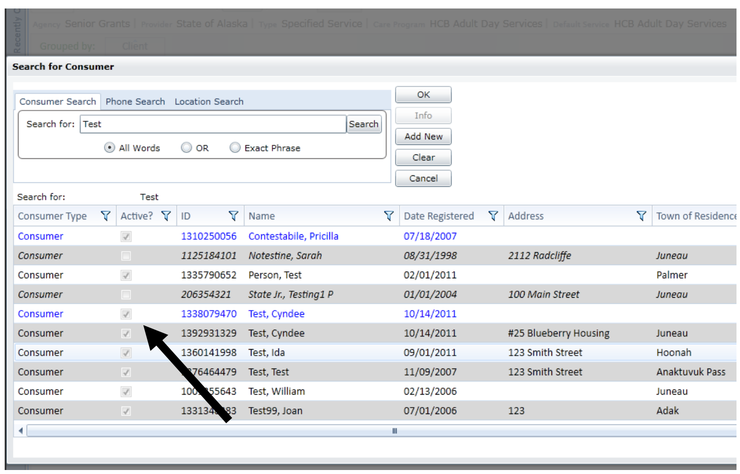
l. Click on “Add Consumer”



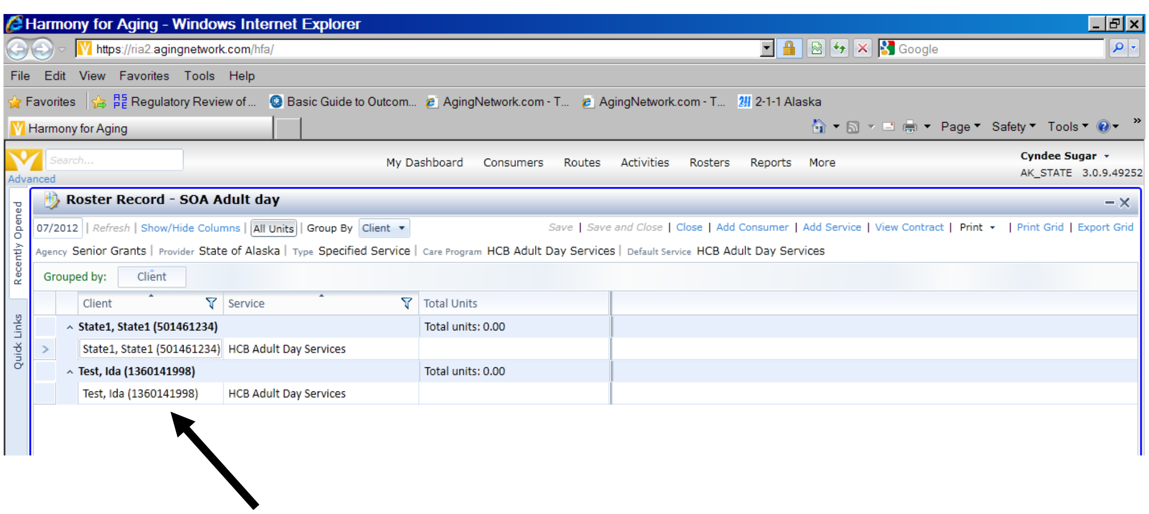
m. Enter the consumer’s last name in the search box and click on “Search”:

n. If the consumer has the care enrollment of the program on their record, they will appear in the window with a box in front of them. If their name is not on this list, you must go back to their client details and enter the care enrollment first:





o. Highlight the consumer to be added to the Roster and click on “OK”, the new person will be added to the roster.



p. Enter the units of service and Save. Save often!

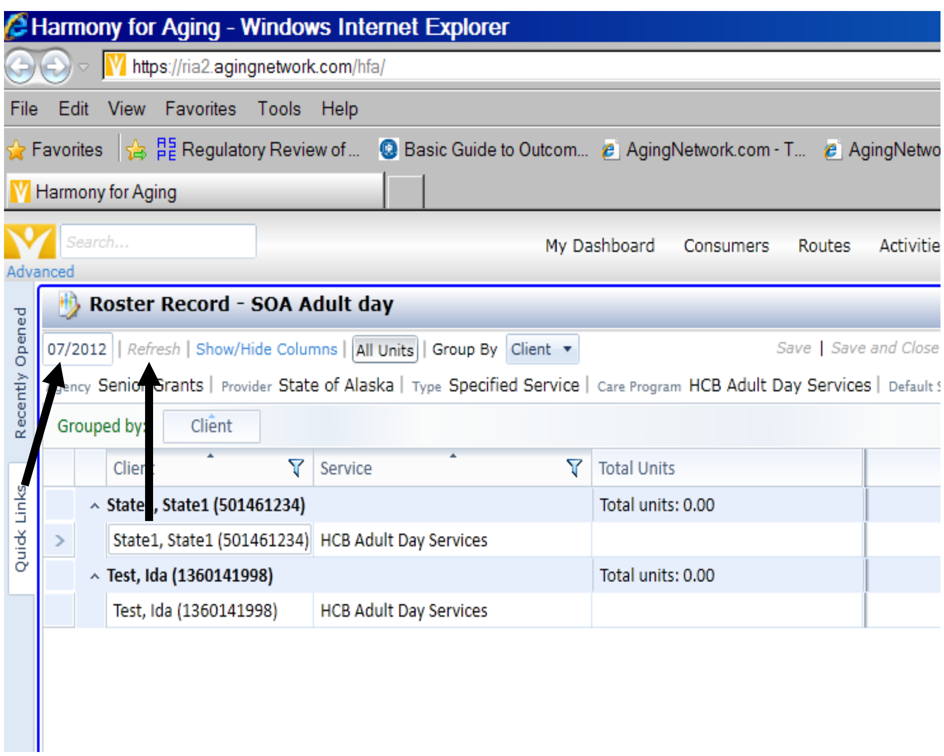
q. For the consumer(s) just added to the Roster, units of service must be entered and saved or they will fall off of the Roster and will not appear next time you open the roster or move to another month. This is okay, it just means you will need to add them again.

r. Important Notes:

- Please note that you must save in order for the data to be saved to your consumer's permanent service delivery record.
- Once you have saved the numbers will display in "black."
- Once an entry is saved a User cannot delete it or change it to a zero. Contact your program manager for the item to be deleted (see below).
- An entry saved, can be edited by a User, just not edited to a zero.

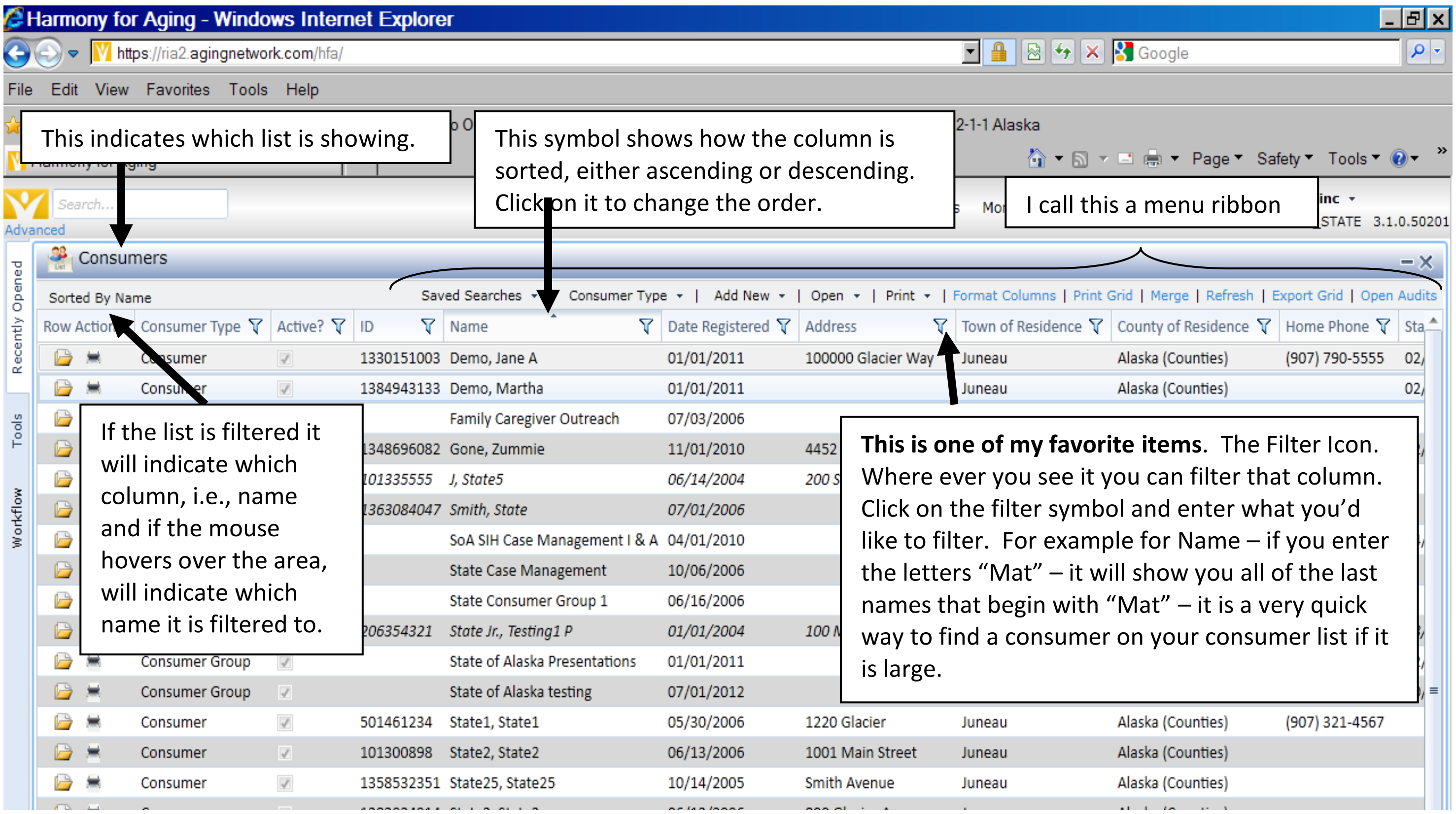
s. In order for an entry to be deleted, A User may edit data in a roster or in the client record, but not delete. Entering a zero will not work either. please send your program manager the consumer's SAMS id number, initials, the service and month that needs to be deleted. PLEASE do not send client names via email.

t. When finished with entering data for the month, you may continue to the next month or view previous months by changing the month at the top left and clicking on *Refresh*.



Tips & Short-cuts:

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



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.

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, go to the clients Details and then Basic Information and enter an active status of "No" and enter the reason.
   b. Also, enter end dates on the care enrollment and provider. 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 and everyone will see them as inactive, so only enter "No" for status if they've passed or moved out of state.

2. Why is a consumer not on my Roster?
   Answer:
   a. Check that a care enrollment has been entered.
   b. Check that there is no end date listed for the care enrollment.
   c. Check to be sure the person is not inactive.

3. Why is SAMS not saving what I've entered?
   Answer:
   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:
   a. Be sure the care enrollment has been added.
   b. Check to be sure you have chosen the correct care program and service category.

5. Are there annual updates we need to do?
   Answer:
   a. Yes. Each year when a consumer is assessed or any data changed, you 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 service in a month?
   Answer: Nothing. If the client did not receive service 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 and 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. What happens if I create a duplicate client record.
   Answer: It happens. Don't beat yourself up about it. You can either perform a merge or send the information to the program manager to assist.
   Whenever there are caregivers and care recipients linked, it becomes more complicated and you will need to refer these to the program manager to resolve.