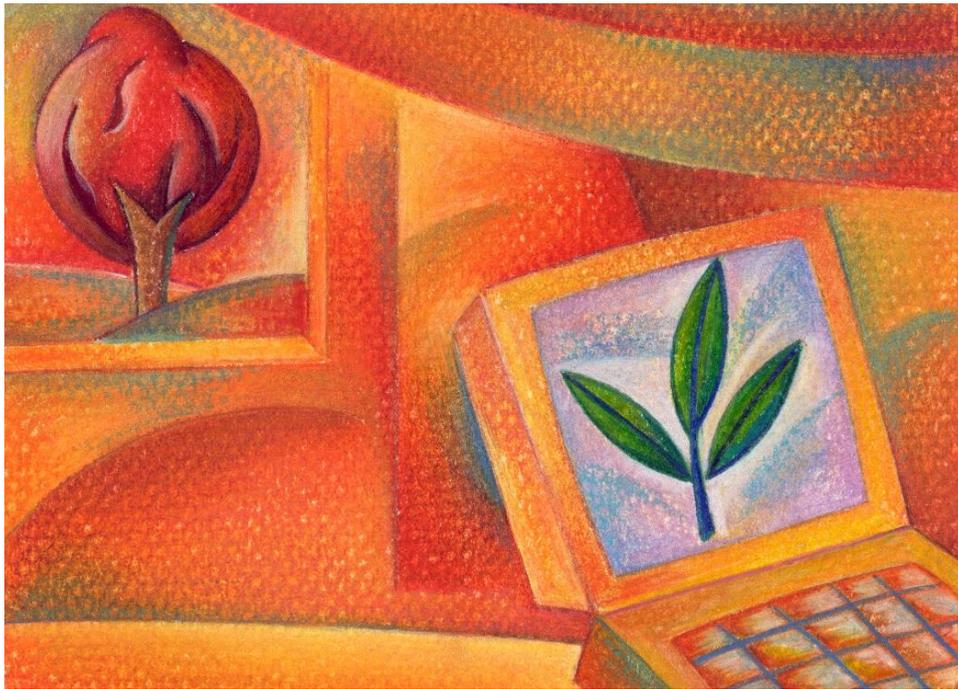


State of Alaska
Department of Health and Social Services
Senior and Disabilities Services - Grants Unit

HCB Senior Grants Data Entry Manual



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

Prepared by:
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Updated September, 2013

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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!

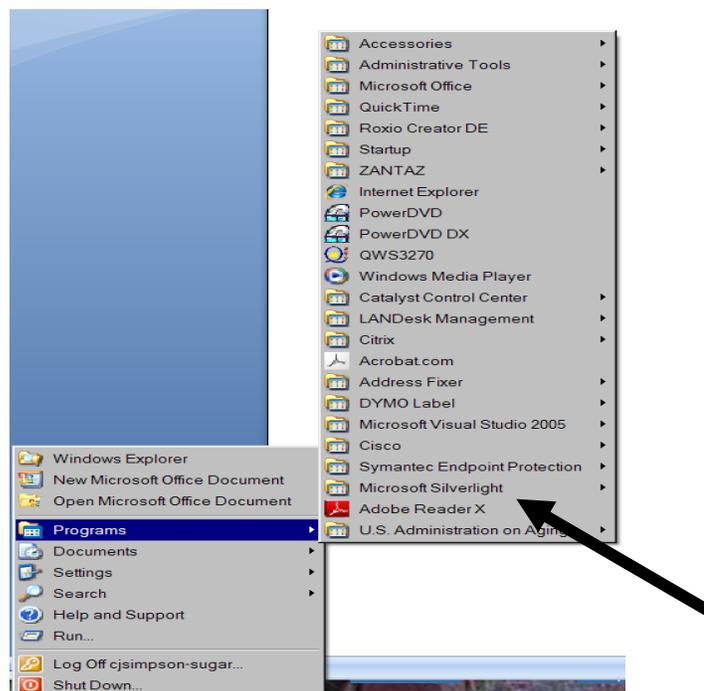
Request Username

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.

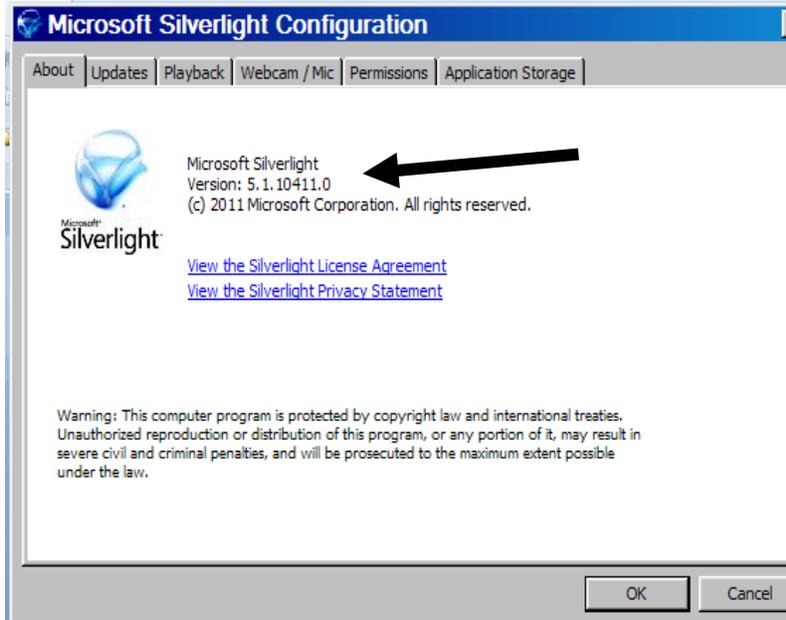
Microsoft Silverlight Plug-In

- 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

- 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) **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 Login

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

The screenshot shows the HFA Main Portal Page in an Internet Explorer browser window. The page features a blue header with the Harmony logo and the user's email address, csugar@agingnetwork.com. Below the header, there are several sections: Application Links, Customer Quick Links, Harmony Quick Links, Harmony News, Customer News, and Application Support Resources. Annotations with arrows point to specific elements: 'Click here to log out' points to the user's email address; 'Click here to change your Portal password' points to the 'My Configuration' link; 'Scroll down this list to find the training tutorials – they are great!' points to the 'Application Support Resources' section; and 'The HFA User Guide is the "master" guide – but is a very large document to print.' points to the 'HFA User Guide December 2011' link in the 'Application Support Resources' section.

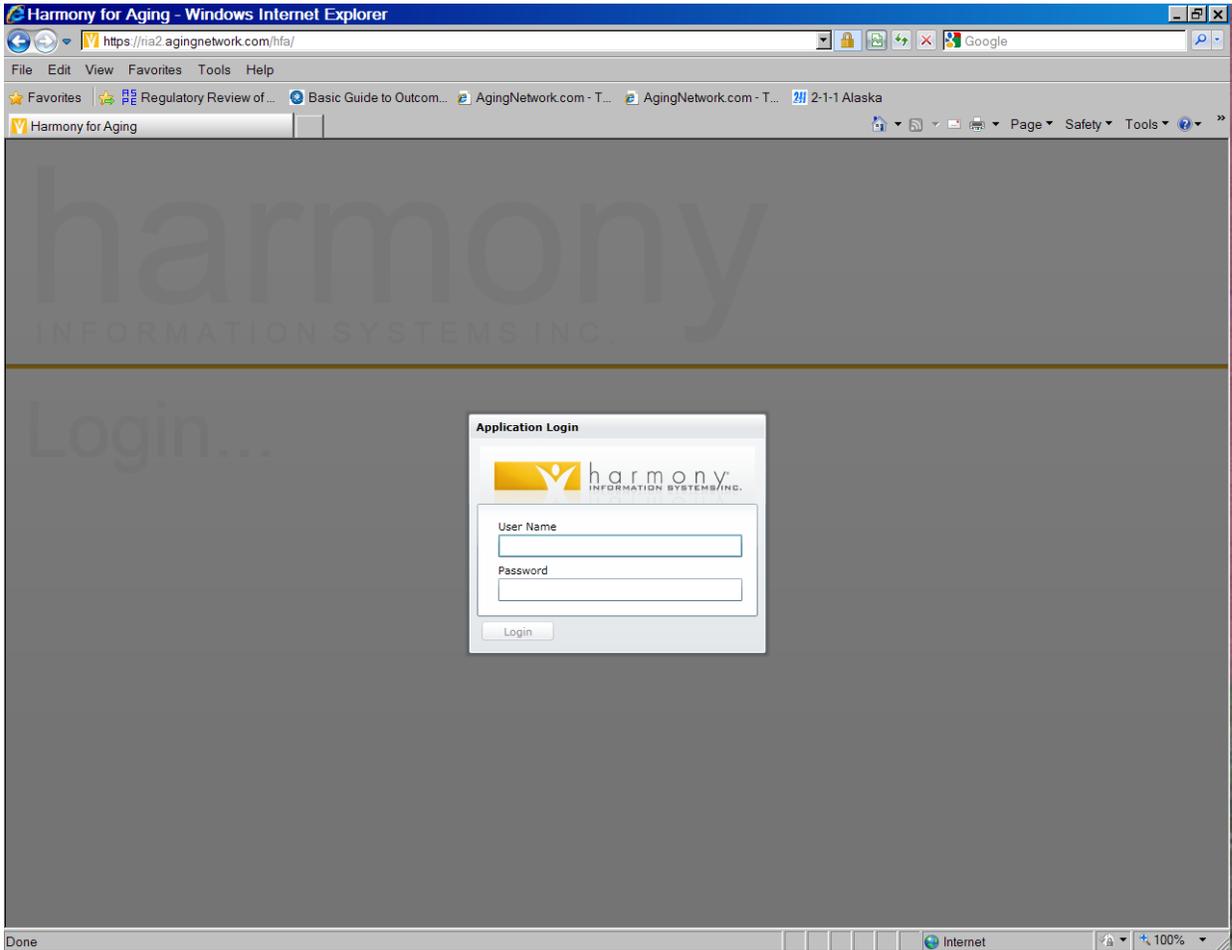
Click here to log out

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**

The screenshot shows the SAMS application main navigation page in Internet Explorer. The browser title is "Harmony for Aging - Windows Internet Explorer" and the address bar shows "https://ria2.aging...". The page features a navigation menu with links: "My Dashboard", "Consumers", "Routes", "Activities", "Rosters", "Reports", and "More". A search bar is located on the left side of the navigation menu. The user's name "Cyndee Sugar" and "AK_STATE 3/19/4698" are visible in the top right corner. The page is annotated with several callout boxes:

- Global Search function to locate a client in the SDS Alaska Grant Database**: Points to the search bar.
- Opens the Consumer list for your agency.**: Points to the "Consumers" link.
- Click on Reports to go the SAMS reports.**: Points to the "Reports" link.
- Shows records recently viewed.**: Points to the "Recently Opened" section in the left sidebar.
- These links may be rearranged by clicking on "More" and choosing "Menu Settings" to change Menu Bar Settings.**: Points to the "More" link.
- Rosters are another tool for data entry. Ask your program manager how to set up. Currently, rosters do not work for the Family Caregiver program.**: Points to the "Rosters" link.
- Click on this character to access "My Settings" – set colors, fonts, and recommend that you set a default for Provider.**: Points to the user's name "Cyndee Sugar".

d. Consumer List

- 1) Click on the tab labeled "Consumers"
- 2) This is a sample Consumer list

The CONSUMER LIST

The screenshot displays the 'Consumers' tab in the Harmony for Aging application. The interface includes a search bar, navigation tabs (My Dashboard, Consumers, Routes, Rosters, Reports, More), and a data grid. The grid columns are: Row Actions, Consumer Type, ID, Name, Active?, Address, Town of Residence, Home Phone, Provider, Gender, and Age. The list contains various entries, including individual consumers and consumer groups. Annotations with arrows point to specific features: 'Consumer type allows you to switch to the Consumer Group list where we enter the headcount-only services.' points to the 'Consumer Type' column header; 'This indicates where you are.' points to the 'Consumers' tab; 'This indicates how the list is currently sorted.' points to the 'Sorted By Name' text; 'The filter icon allows you to filter the list by that column. Using the filter for "Name" is a quick way to find a client record.' points to the filter icon in the 'Name' column; 'Click on format columns to change the columns seen on your screen.' points to the 'Format Columns' link; 'A client record may be opened by double clicking or clicking on the edit file icon.' points to the edit icon in the 'Row Actions' column; 'Blue text, indicates the individual is enrolled in the caregiver program.' points to the blue text 'Test, Cyndee' in the 'Name' column; 'Names in italics = record is inactive - this can be changed.' points to the italicized name 'Testing, Newmike' in the 'Name' column.

| Row Actions | 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 checked="" type="checkbox"/> | | Juneau | | State of Alaska | Female | 62 |
| | Consumer Group | | Family Caregiver | <input checked="" type="checkbox"/> | | | | State of Alaska | Unknown | |
| | Consumer | 1348696082 | Gone, Zummie | <input checked="" type="checkbox"/> | | | (907) 123-4567 | State of Alaska | Female | 79 |
| | Consumer | 1013355555 | J, State5 | <input checked="" type="checkbox"/> | | | | State of Alaska | Male | 79 |
| | Consumer | 1363084047 | Smith, State | <input checked="" type="checkbox"/> | | | | State of Alaska | Female | 71 |
| | Consumer Group | | SoA SIH Care Coordination I & B | <input checked="" type="checkbox"/> | | | | State of Alaska | Unknown | |
| | Consumer Group | | State Care Coordination I & A | <input checked="" type="checkbox"/> | | | | State of Alaska | Unknown | |
| | Consumer Group | | State Consumer Group 1 | <input checked="" type="checkbox"/> | | | | State of Alaska | Unknown | |
| | Consumer | 206354321 | State Jr., Testing1 P | <input type="checkbox"/> | 100 Main Street | Juneau | (907) 123-4567 | State of Alaska | Male | 77 |
| | Consumer Group | | State of Alaska Presentations | <input checked="" 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 | | | <input checked="" type="checkbox"/> | 1001 Main Street | Juneau | | State of Alaska | Unknown | 82 |
| | Consumer | | | <input checked="" type="checkbox"/> | Smith Avenue | Juneau | | State of Alaska | Unknown | |
| | Consumer | | | <input checked="" type="checkbox"/> | 800 Glacier Avenue | Juneau | | State of Alaska | Male | 71 |
| | Consumer | | | <input checked="" type="checkbox"/> | 100 Seward Street | Juneau | | State of Alaska | Female | 78 |
| | Consumer | | | <input checked="" type="checkbox"/> | 300 Segard | Juneau | | Alaska Community Sen | Female | 78 |
| | Consumer | 101340000 | State6, State6 | <input checked="" type="checkbox"/> | | | | State of Alaska | Male | 82 |
| | Consumer | 101307777 | State7, State7 | <input checked="" type="checkbox"/> | | | | State of Alaska | Unknown | |
| | 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 checked="" type="checkbox"/> | 123 Smith Street | Anaktuvuk Pass | | | Female | 72 |
| | Consumer | 1001355643 | Test, William | <input checked="" type="checkbox"/> | | | | Bristol Bay Native Asso | Male | 76 |
| | Consumer | 1331348383 | Test99, Joan | <input checked="" type="checkbox"/> | | | (907) 465-4876 | State of Alaska | Female | 65 |
| | Consumer | 920454681 | Testing, Newmike | <input checked="" type="checkbox"/> | | | (907) 465-8279 | Alaska Island Communi | Male | 66 |
| | Consumer | 1328612917 | Testine23, Testine | <input checked="" type="checkbox"/> | | | | State of Alaska | Male | 69 |

- e. **Client Details** – Sections marked with a Red Dot ● requires some data elements.
- f. Items marked with purple star ★ must be updated at least annually.
- g. Items marked with blue oval ○ are for the Family Caregiver program only.

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

Indicates the client record that is being viewed.

Will open the left side of screen to edit/enter demographics. Click 'OK' to accept.

More fields may be found here to add to the right side of screen as needed?

When information is updated, this date should always be made current.

Only enter "yes" when it applies. Be sure ADRD is entered whenever it applies!

Use the "Notes" section only for special notes or instructions that help all providers working with the consumer, i.e., consumer is blind, hard of hearing, has loud dog but does not bite, etc.

Basic Information

| | |
|--------------------------------|-------------|
| Name | Martha Demo |
| Date Registered | 01/01/2011 |
| Consumer Details Last Reviewed | 02/03/2011 |
| Gender | Female |
| DOB | 01/01/1940 |
| Information Release Authorized | No |
| Default Agency | SDS Grants |
| Active | Yes |
| Status Date | 02/03/2011 |
| Age | 73 |

Consumer Diagnosis Category

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

IDD Eligibility Information

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

Insurance

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

Other Characteristics

| | |
|----------------------------|---------|
| Employment Status | Unknown |
| Abused/Neglected/Exploited | No |
| Cognitive Impairment | Unknown |
| Disabled | No |
| Duplicate Mail | No |
| Female Head of Household | No |
| Frail | No |
| Homebound | No |
| Receiving Social Security | No |
| State Resident | Yes |
| Tribal | No |
| Understands English | Yes |
| U.S. Citizen | Yes |
| Veteran? | No |
| Veteran Dependent | No |
| Primary Language | English |

NAPIS

| | |
|--------------------------------|------------------------|
| Ethnicity | Not Hispanic or Latino |
| In Poverty? | Yes |
| Lives Alone? | Yes |
| High Nutritional Risk? | Don't Know |
| Is Rural? | Yes |
| Number of ADLs | 1 |
| Number of IADLs | 4 |
| NSIP Meal Eligible | Yes |
| NSIP Eligibility Type | Age (60 or Over) |
| Lives in Assisted Living | Don't Know |
| Lives w/ <60 Caregiver | Don't Know |
| Lives w/60+ Caregiver | Don't Know |
| Lives w/other 60+ Frail Person | Don't Know |

Care Enrollments

| | | |
|-----------------------------|--------|------------------------------|
| HCB Adult Day Services | Active | 01/01/2011 - (Not Specified) |
| HCB Senior In-Home Services | Active | 01/01/2011 - (Not Specified) |
| NAPIS - Title III | Active | 01/01/2011 - (Not Specified) |

Caregivers

| | |
|--------------------------------------|--------------------------|
| Demo, Jane A (1330151003) | SDS Grants |
| (907) 790-5555 | |
| 1/1/2011 - (Unspecified) [Federal] | Daughter/Daughter-In-Law |

Custom Fields

| | |
|-------------------|-----|
| Physically Frail: | Yes |
|-------------------|-----|

Ethnic Races

| |
|------------------------------------|
| Non-Minority (White, non-Hispanic) |
|------------------------------------|

Locations

| |
|-----------------------------|
| Residence: Juneau, AK 99802 |
| Alaska (Countries) County |
| Mailing: Juneau, AK 99802 |
| Alaska (Countries) County |

Notes

Phones

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

Providers

| | |
|-----------------|------------------------------|
| State of Alaska | 01/01/2011 - (Not Specified) |
|-----------------|------------------------------|

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.
 - **Accidentally 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 above** 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

| Grant Program | Level of Care | Service Program | Service(s) |
|--|--|---|--|
| Adult Day Services | Home & Community Based Programs | HCB Adult Day Services | <u>Registered Services:</u> HCB Adult Day Services <u>Unregistered - Consumer Groups Only:</u> HCB Adult Day Services Transportation |
| Senior In-Home Services | Home & Community Based Programs | HCB Senior In-Home Services | <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 |
| National Family Caregiver Support Program | Federal Administration on Aging Programs | Family Caregiver Support Program – Title III(e) | See table below |
| <p>Registered Services = services to clients registered in SAMS. Services are entered/applied to a registered client's record</p> <p>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.</p> <p>Note: Registered services are only entered on a registered Client record and Unregistered services are only used in consumer groups. The services are never mixed.</p> | | | |

Registering a Brand New Consumer

1. **Use the NFCSP or HCB SAMS Registration Form as your guide for the information to be entered**
2. **Open the consumer list**
 - **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

The screenshot shows a 'Register Consumer' window with the following fields:

- Last Name, First Name, MI
- Date Registered: 7/2/2012
- Home Phone: () - -
- Gender: Unknown
- DOB:
- SSN: - - -
- Home Address Line 1:
- Home Address Line 2:
- County:
- Town:
- State:
- Zip Code:
- Same for Mailing:

Click “Okay”

The Consumer’s Summary Screen will show again:

3. **Go to Left side of screen**
 - 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. **Now go to Right side of screen**
- 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 unless you are a NFCSP program. 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

The screenshot shows a web browser window displaying a client record for 'Cyndee (1392931329)'. The 'Add New' dropdown menu is open, and the 'Care Recipient' option is highlighted. The interface includes a navigation bar with options like 'My Dashboard', 'Consumers', 'Calls', 'Routes', 'Activities', 'Rosters', and 'Reports'. The client record details are visible on the left, and the main content area shows various modules like 'Care Enrollments', 'Custom Fields', 'Directions To Home', 'Ethnic Races', and 'Locations'. The 'Add New' dropdown menu is open, and the 'Care Recipient' option is highlighted. Arrows point to the 'Add New' button and the 'Care Recipient' option.

Search... My Dashboard Consumers Calls Routes Ad

anced

Consumer - Test, Cyndee (1392931329)

Details Activities & Referrals Assessments Billing Calls Care Plans Jour

Care Recipient - X

OK | Cancel | Add Next | Open Audits | Open Care Recipient |

Caregiver Relationship to Care Recipient

Care Recipient

Care Recipient Client ID

Care Recipient Agency

Start Date 10/14/2011

End Date Enter date

Primary?

Family Caregiver Program Type Federal

At Risk for Abuse or Neglect

No

Yes

Don't Know

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

Search for Consumer

Global Search Advanced Search

Search for: Search

All Words OR Exact Phrase

Phone: Search

Location: Search

All Words OR Exact Phrase

Search for:

OK

Info

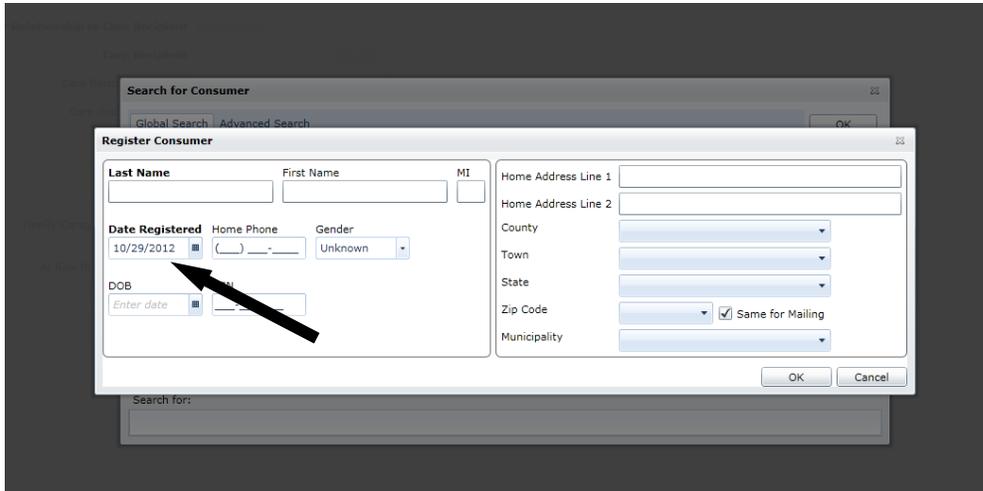
Add New

Clear

Cancel

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 **BE SURE THAT YOU CHANGE the date registered** 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 <u>register and follow</u> 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 <u>Note:</u> 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 |

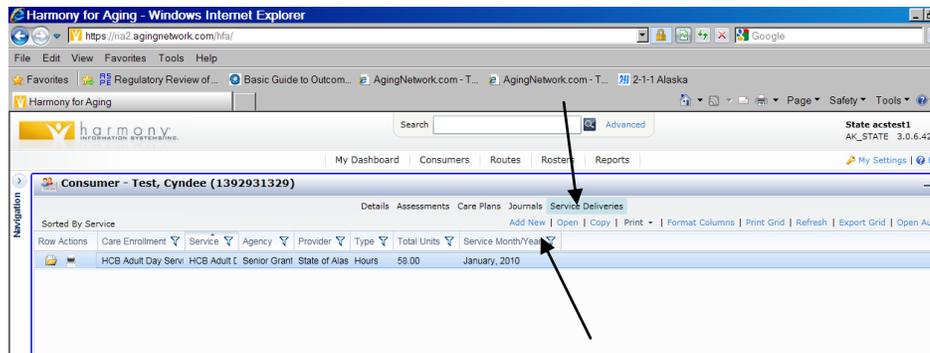
NFCSP Services at a Glance

| 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 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 | | <i>No- but may register. If registered enter name and town of residence at minimum</i> | |
| 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

The screenshot shows the 'Service Delivery Entry' screen for a consumer named Cyndee (1392931329). The interface includes a navigation pane on the left with a 'Navigation' button. The main content area is titled 'Consumer - Test, Cyndee (1392931329)' and contains a 'Service Delivery - 1 Units' entry. The form fields are as follows:

- Care Enrollment:** HCB Adult Day Services - 01/01/2010 - (No End Date) (Active)
- Agency:** Senior Grants
- Provider:** State of Alaska
- Service Category:** HCB Adult Day Services
- Service:** HCB Adult Day Services
- Topics:** (0 Items)
- Service Month/Year:** 01/2010
- Total Units:** 1.00
- Type:** Hours
- Diagnosis Code:** (Empty)
- Service Order No.:** Order No : (None)

To the right of the form is a calendar for January 2010, with the text 'Specify units by day in the calendar below:'. The calendar shows the following dates and units:

| 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 |
| 31 | | | | | | |

At the bottom of the screen is a 'Comments' section with a text input field and a 'Save' button.

I. Short Cut for Entering Services When Service is the Same as previous month

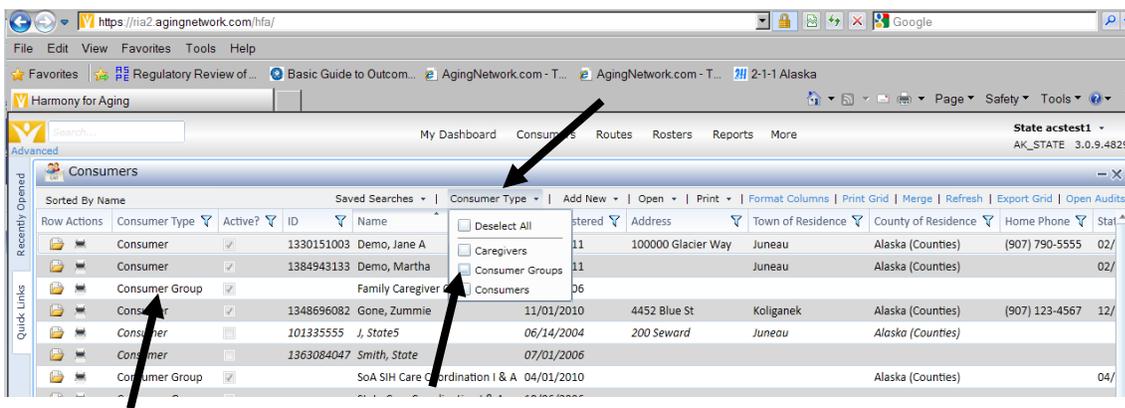
Open the client and go to their service delivery list:

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

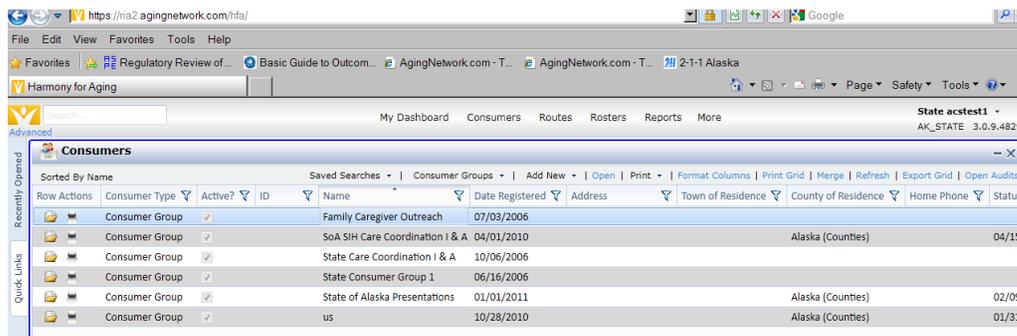
Consumer Groups

Consumer groups are used for entering unregistered services:

- head counts of I & A for unregistered 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.

The screenshot shows the 'Harmony for Aging' web application in Internet Explorer. The page title is 'Consumer Group - Family Caregiver Outreach'. The form contains the following fields and values:

- Care Program: [Dropdown]
- Agency: Senior Grants
- Provider: State of Alaska
- Service Category: [Dropdown]
- Service: [Dropdown]
- Topics: (0 Items)
- Service Month/Year: 11/2012
- Units: 1.00
- Type: [Text]
- Consumers Served: 1
- Units/Consumer: 1.00000000
- Diagnosis Code: [Text]
- Service Order No: Order No : (None)

A calendar for November 2012 is shown on the right, with the following data:

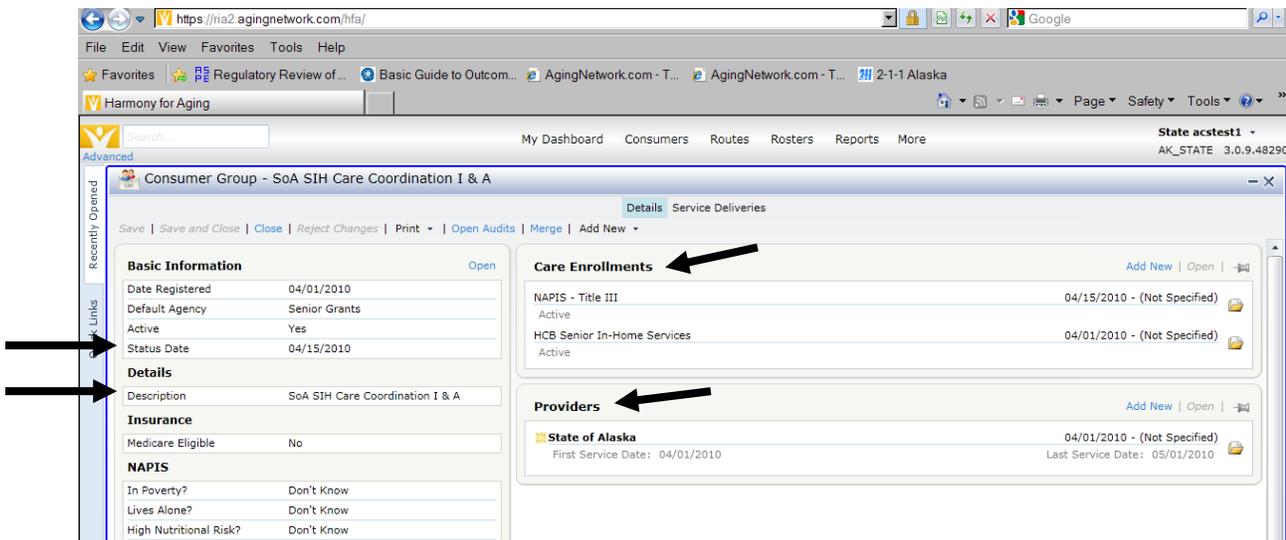
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | |

Arrows in the image point to the following elements:

- Care Program dropdown
- Agency dropdown
- Provider dropdown
- Service Category dropdown
- Service dropdown
- Service Month/Year field
- Units field
- Consumers Served field
- Comments text area

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

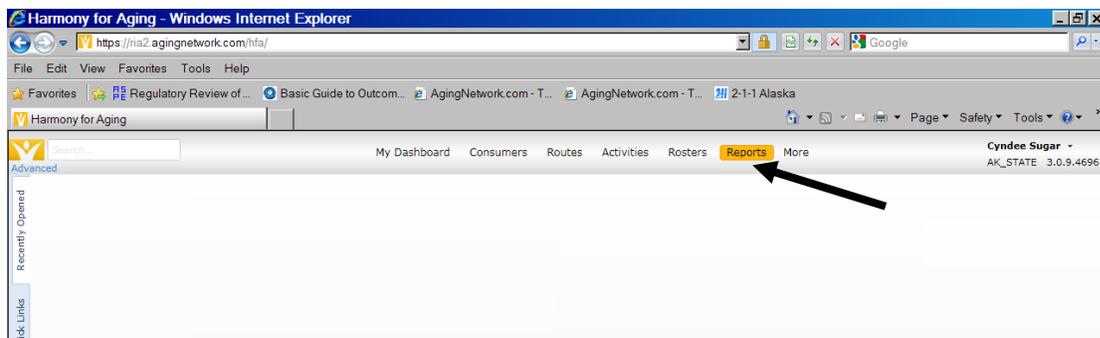


To return to your list of Consumers

- 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

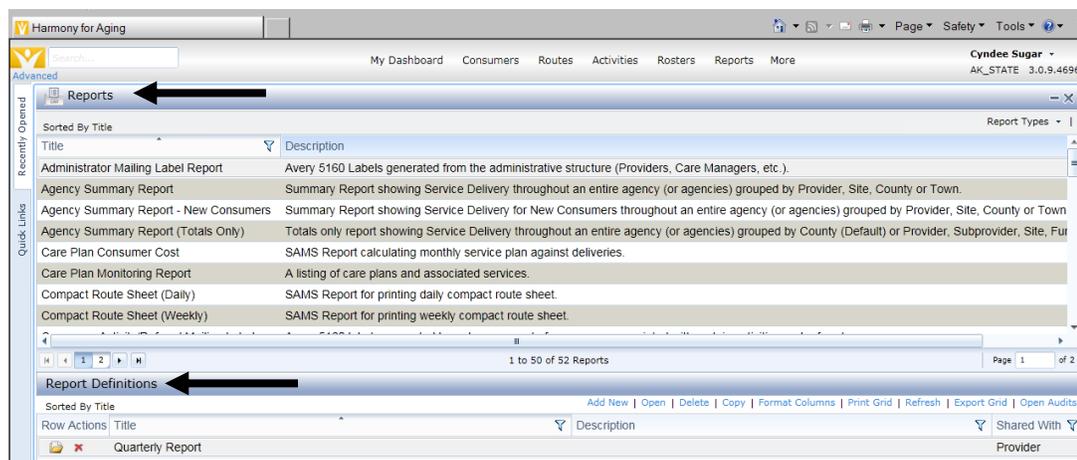
From the Main Screen, click on Reports



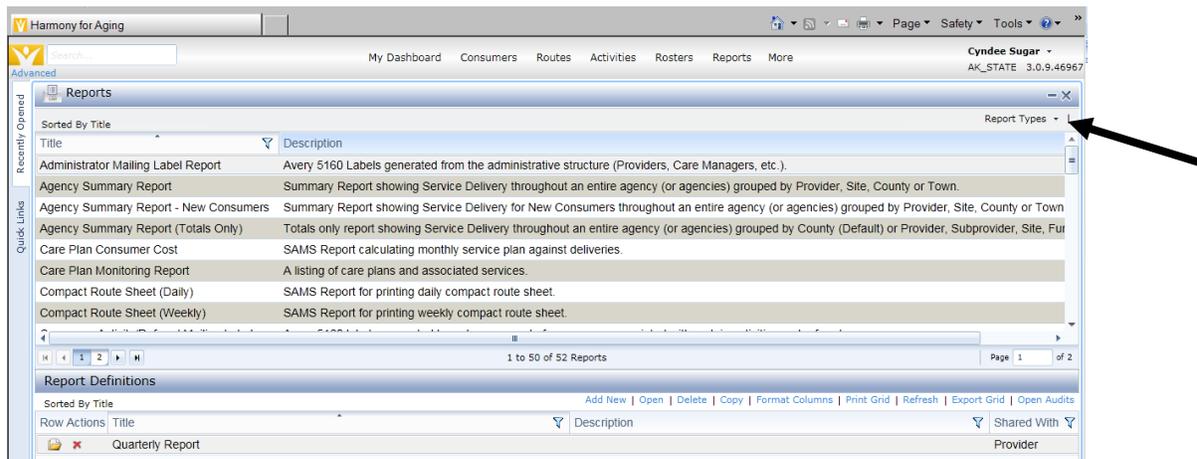
- There are many different types/formats of reports available.
- Service Reports are the format we use most.
- Service reports are based on a period of service delivery, such as a month or a quarter.
- The most common Service Report we use is the Agency Summary Report.

Running an Agency Summary Report

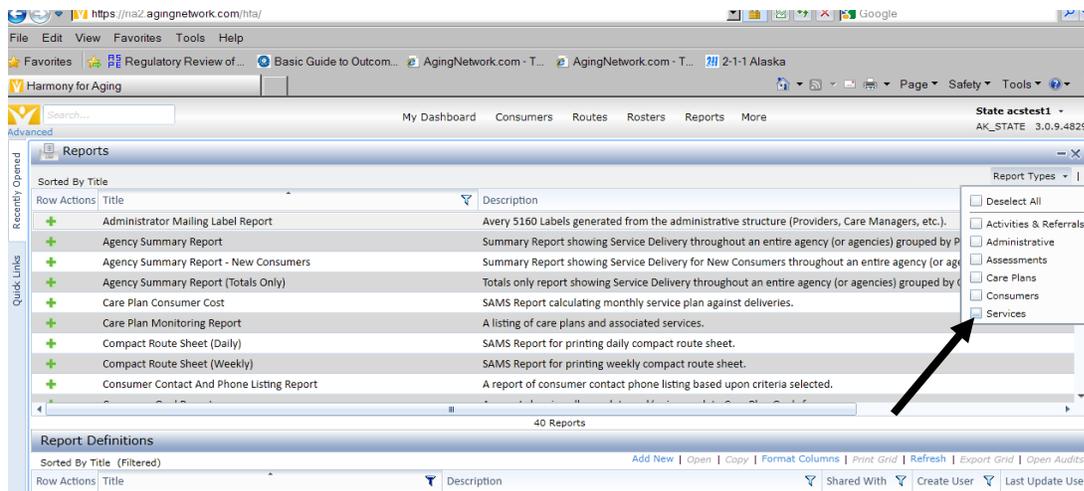
1. The screen is split into two halves:
 - **Reports** on top half (list of types/formats available) and
 - **Report Definitions** on the bottom half (definitions of the report type saved).



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

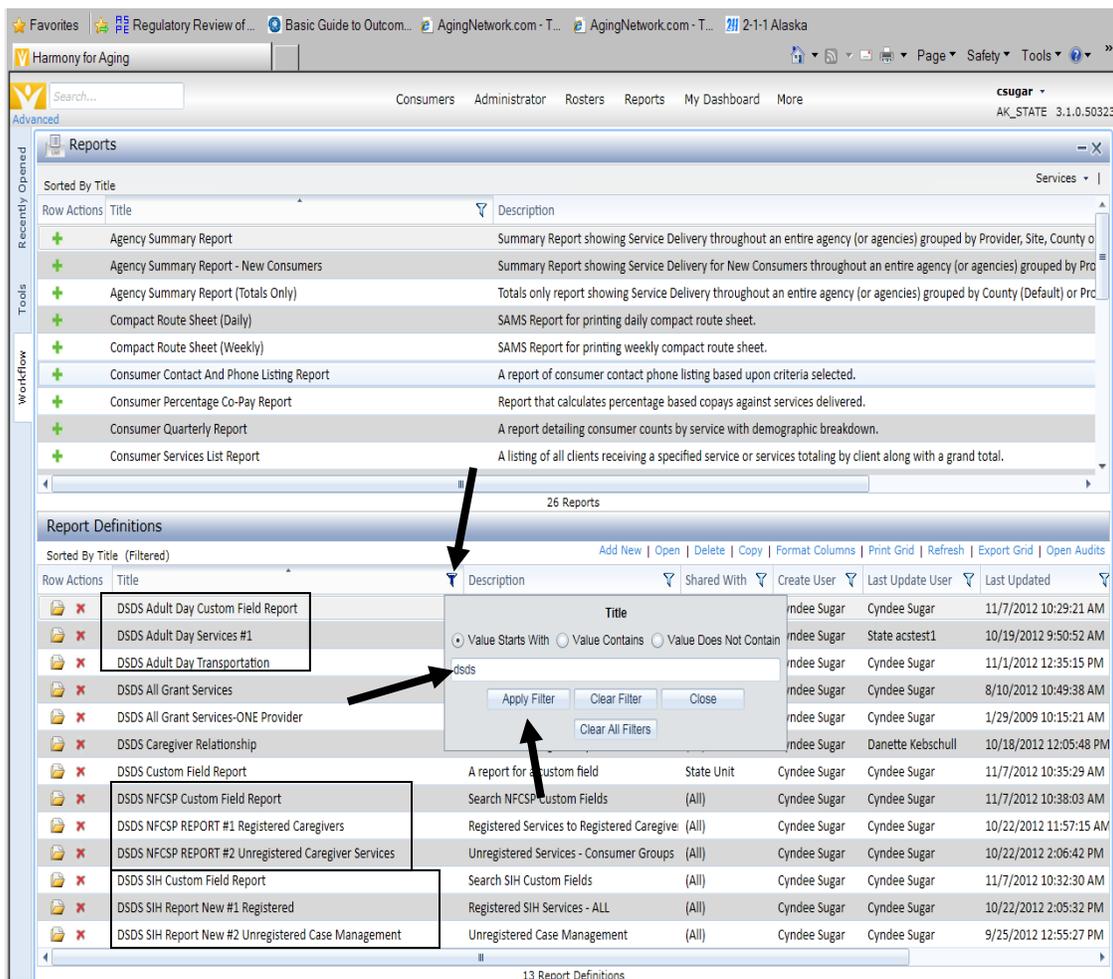


- Choose "Services" and the top will show only "Service" reports.



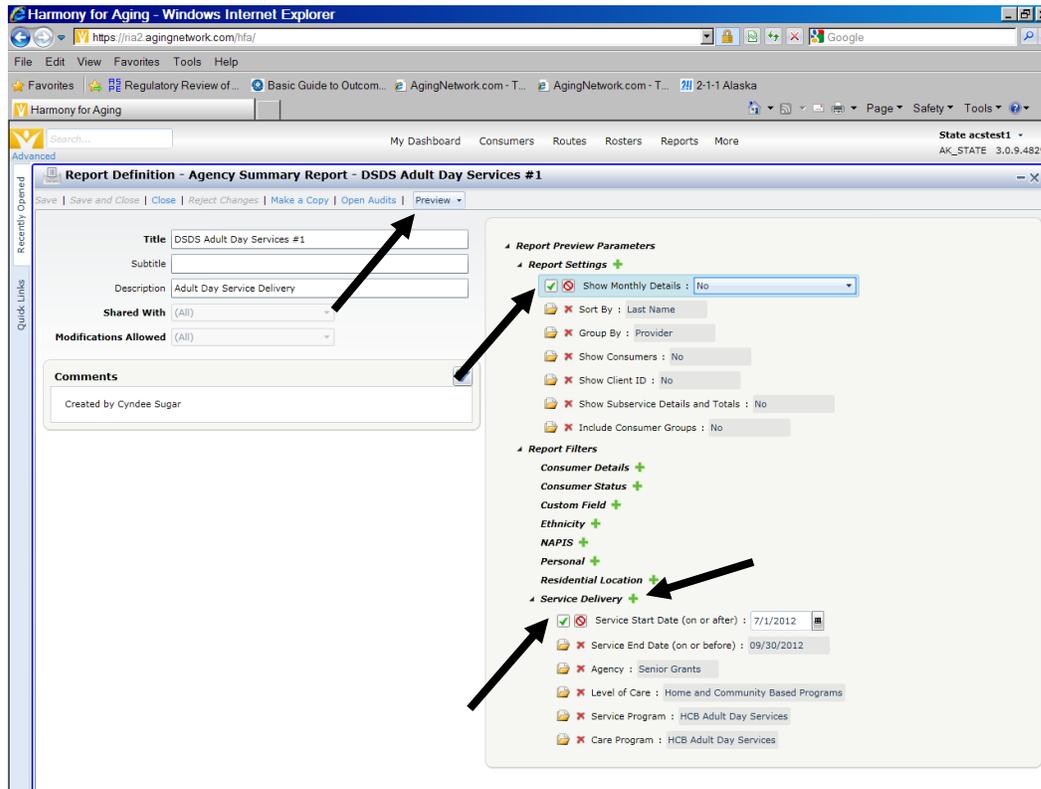
- You should now see only the Service Reports and the Agency Summary Report is usually the first one.
- If not, you may need to click on the triangle in the heading to alphabetize.

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 is 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.

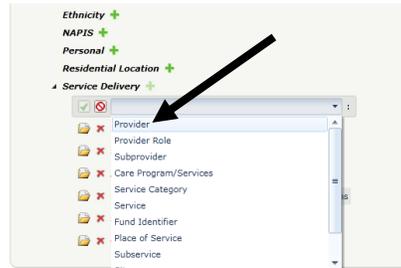
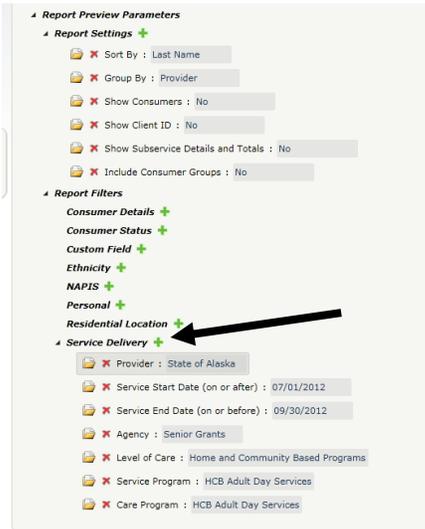
20. The parameters have been preset for the DSDS ADS, SIH and NFCSP report definitions indicated in the boxes above – you will need to **set or reset** the following:

- 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.*

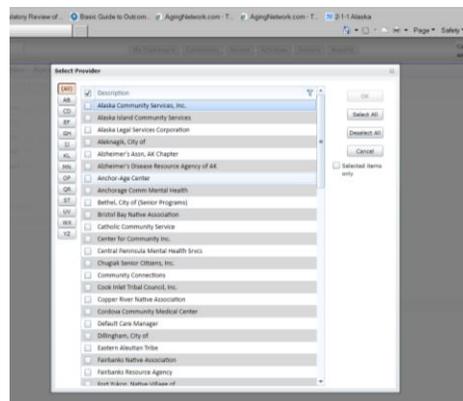
21. Click on the **file folder icon** to edit an item.

22. IMPORTANT, if there is ever a **green check mark ✓ visible**, 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.



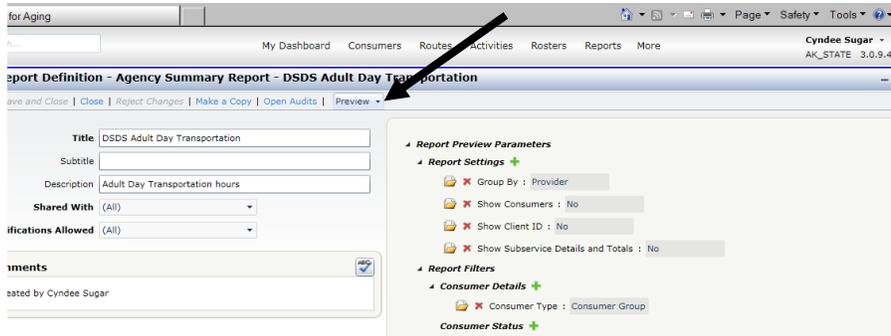
24. Another window opens for you to indicate the provider. Choose the Provider.



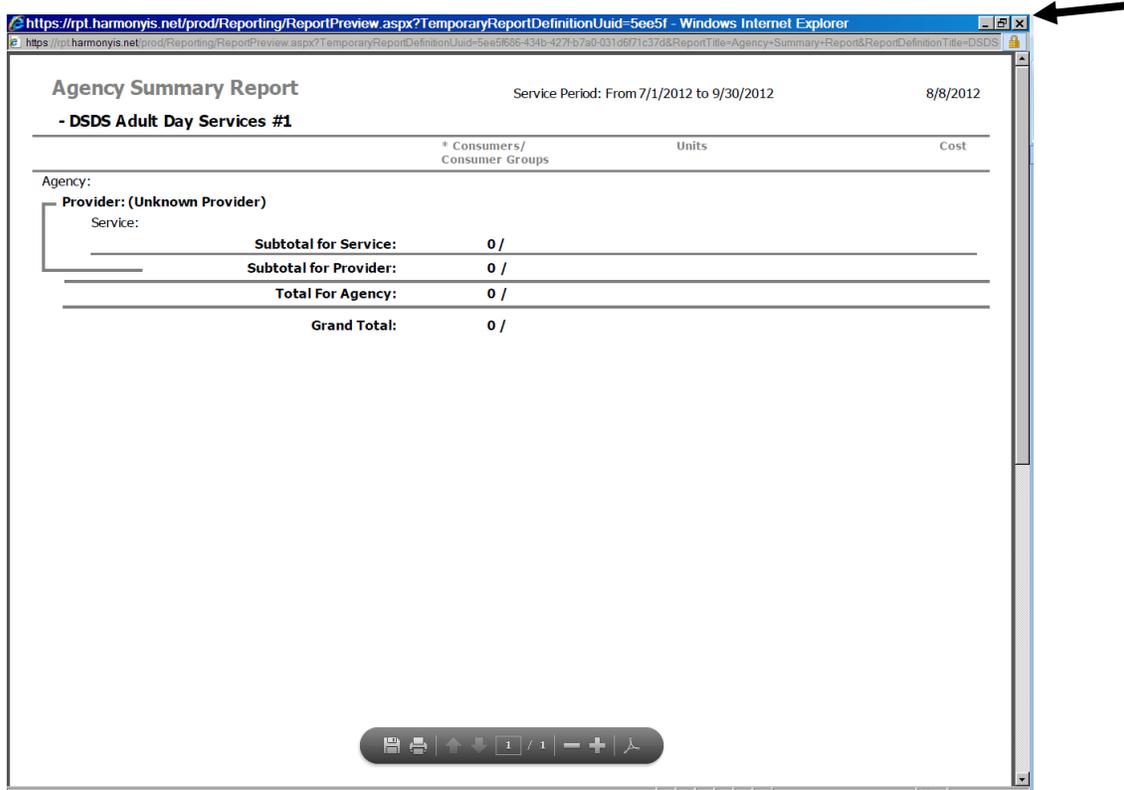
25. Check the box for the provider

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.



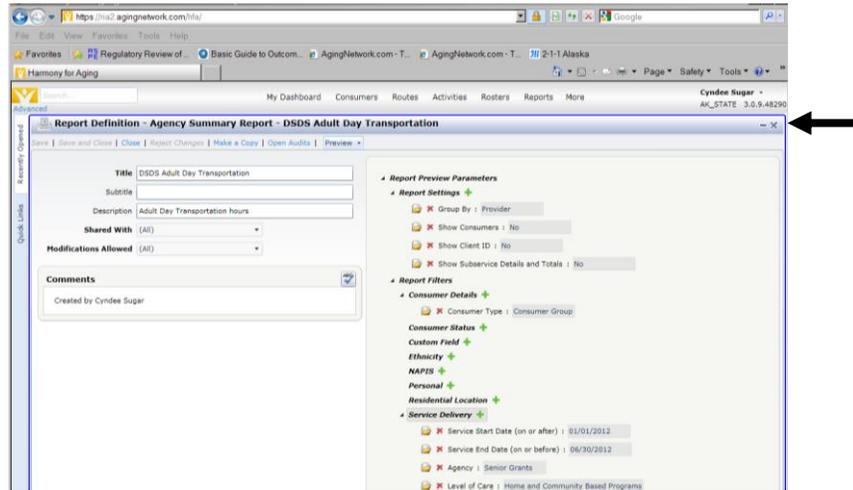
28. Your report will appear something like this, but with numbers:



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 by 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.

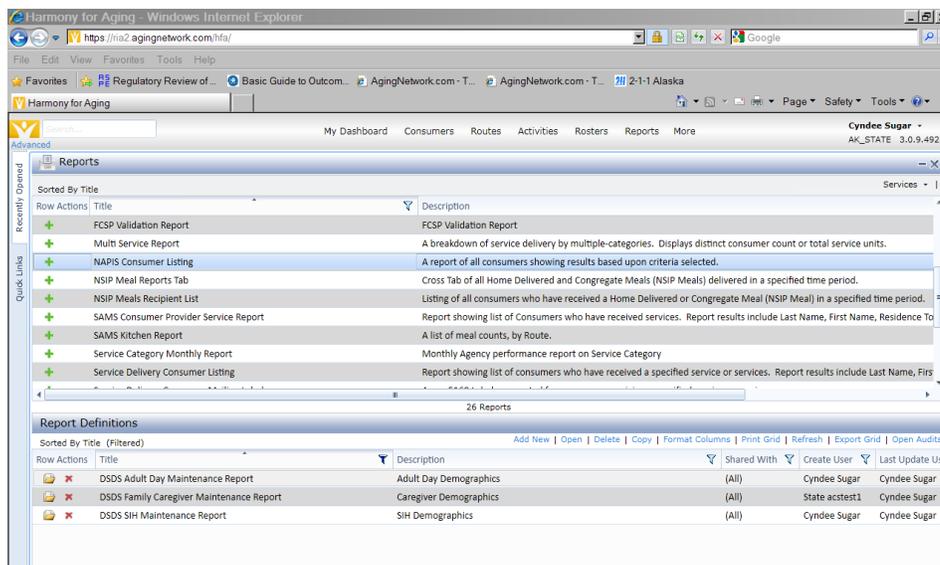
NAPIS Demographic Check Report - Run each quarter

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.



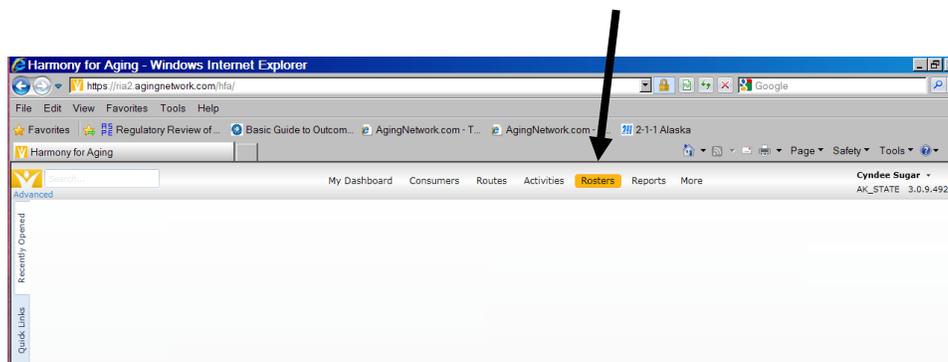
A copy of this report may also be made for your agency – see previous section for steps.

Rosters

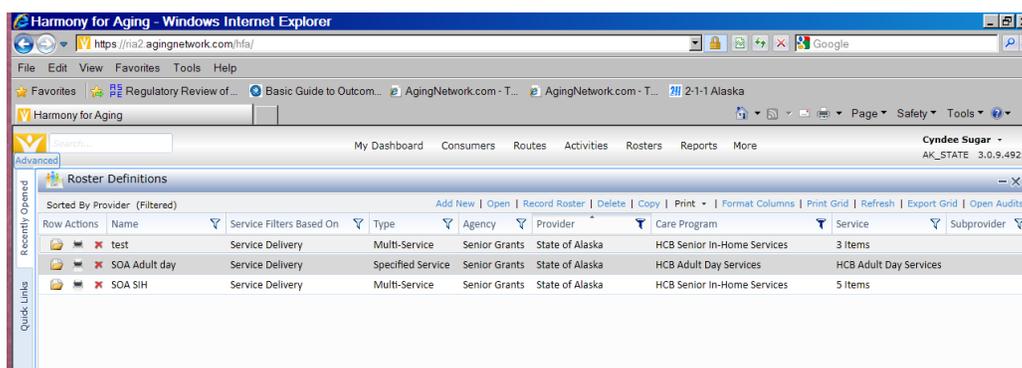
Rosters are a tool that filters your consumers by program and services all to a single screen for quick data entry. Currently rosters do not work for the National Family Caregiver Support Program, but it is expected that they will be available in the future.

To set-up a roster for data entry:

- a. Click on Rosters



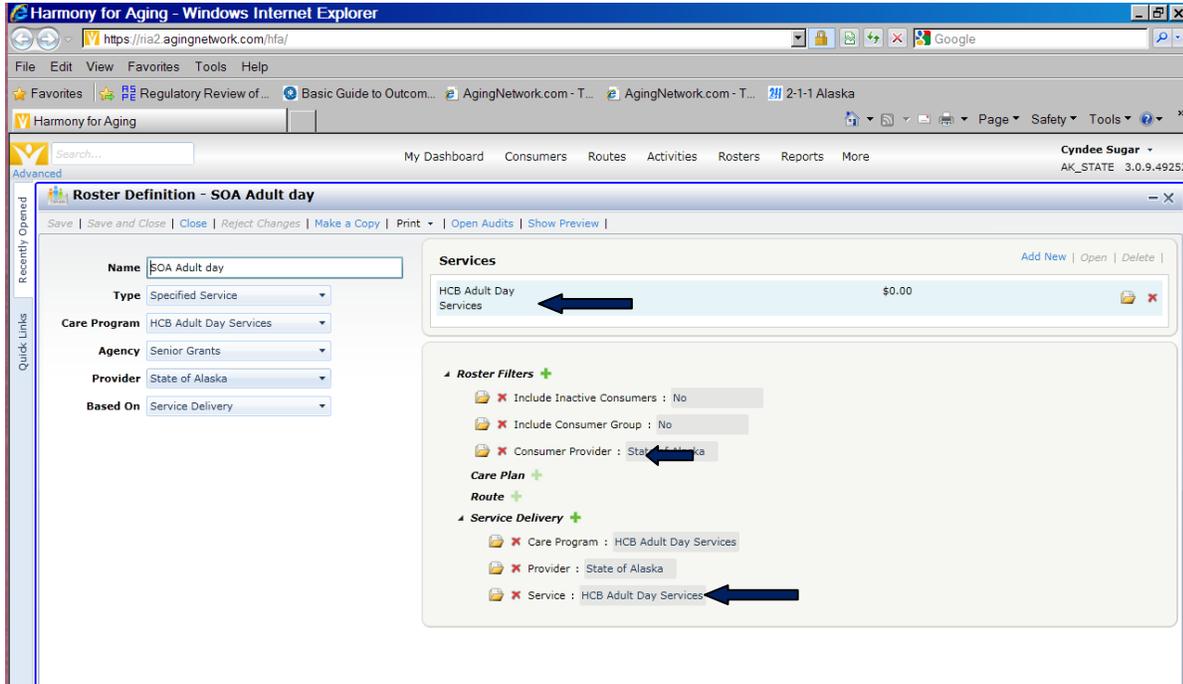
- b. You will either see a blank screen or rosters that have been defined for your agency



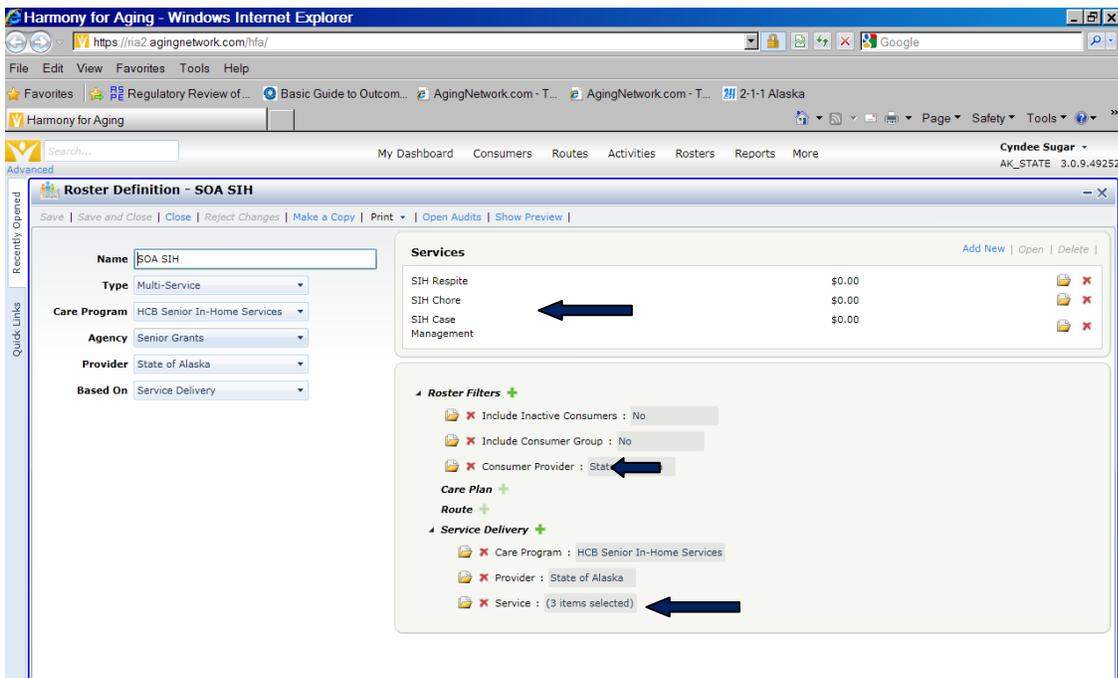
- c. If you see a roster for your program and services, double click on the Title to open the definition.
- d. The parameters are set so that consumers connected with the particular program and its services definitions will be pulled to the Roster.

- 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.”

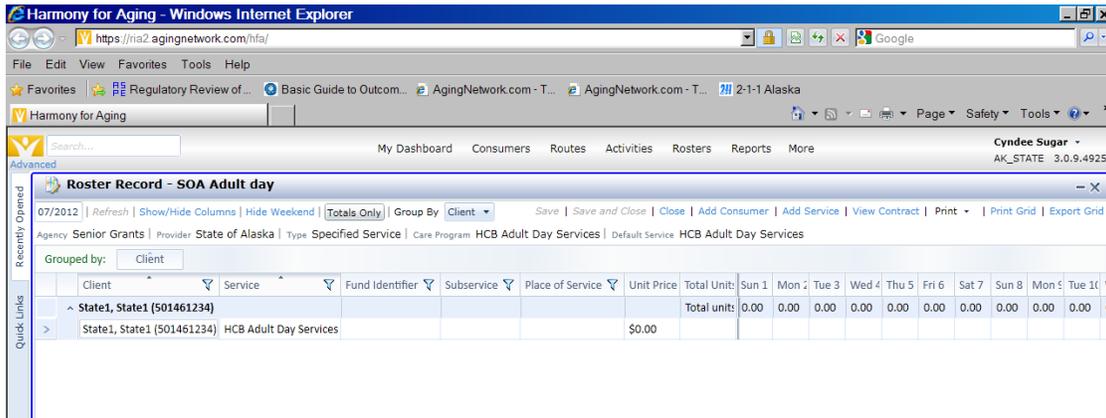
Adult Day Roster Definition:



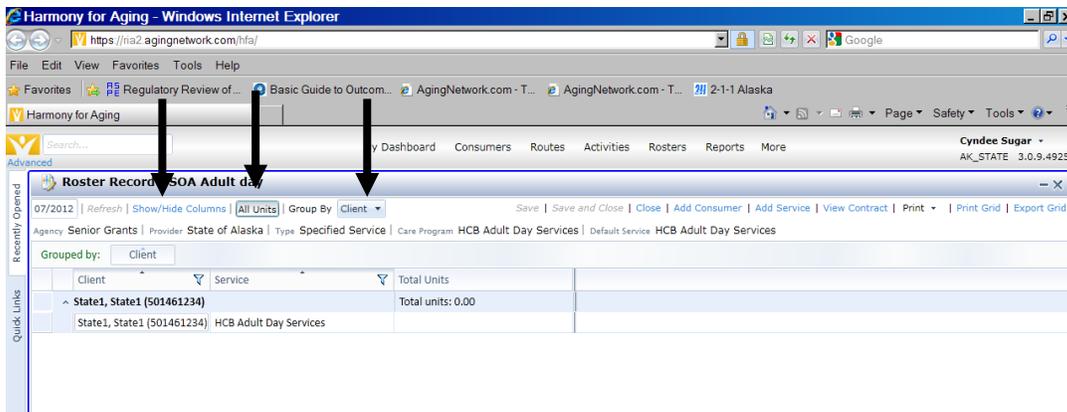
Senior In-Home Roster Definition:



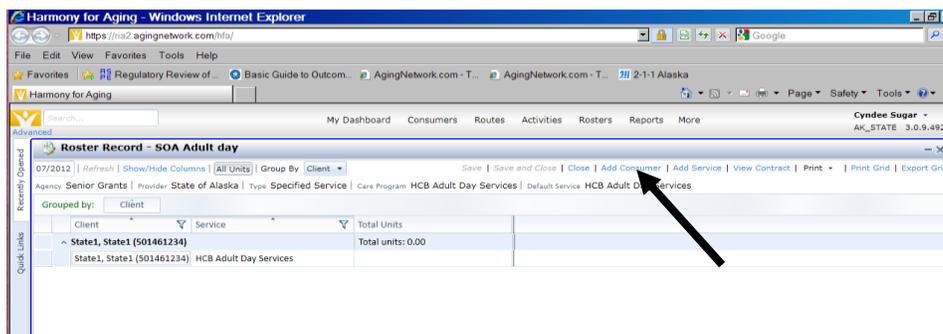
- f. Once the Roster definition is set save and close.
- g. **Highlight the Roster title**, be careful not to open
- h. Click on **“Record Roster”**
- i. The consumers with the care enrollment of the program will populate the roster. This may take a few minutes.



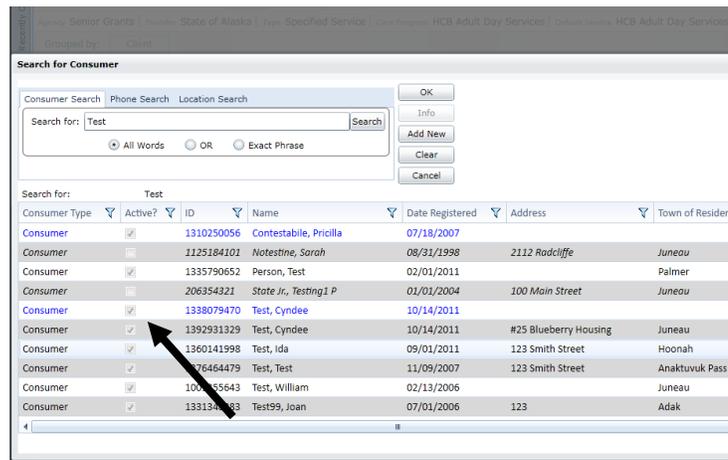
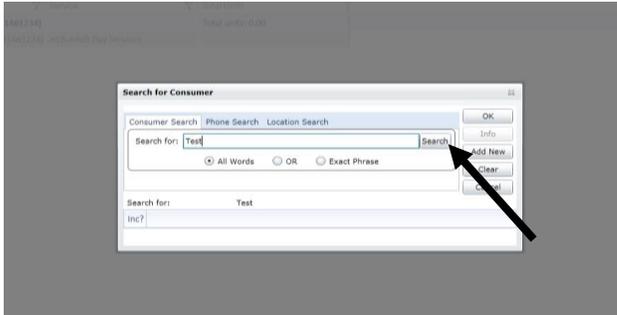
- j. The roster displays certain fields and may be sorted a variety of ways to suite your style. For example:



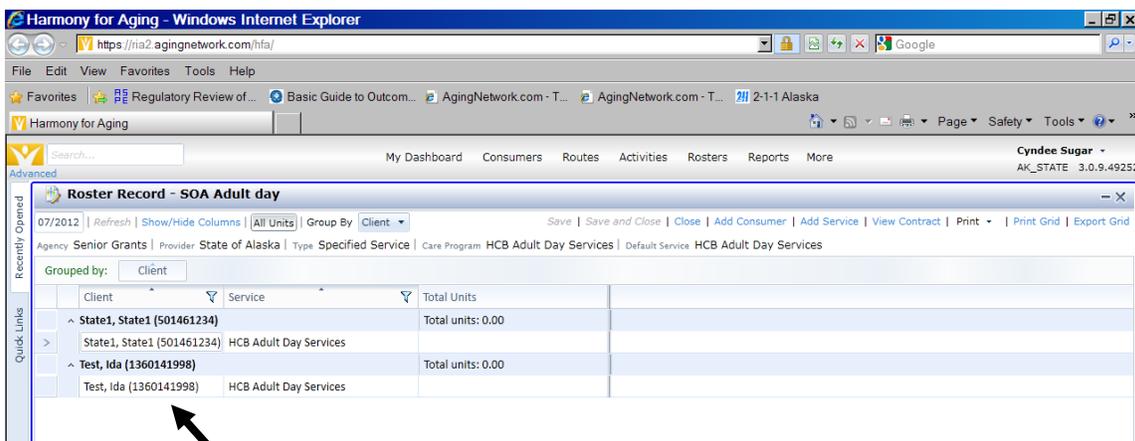
- k. To add a new consumer to the roster, the consumer must first be set up in SAMS and have the care enrollment of the program entered on their record.
- l. Click on **“Add Consumer”**



- 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*.

The screenshot shows the 'Harmony for Aging' web application in Internet Explorer. The browser address bar shows the URL 'https://ria2.agingnetwork.com/hfa/'. The application header includes a search bar and navigation tabs: 'My Dashboard', 'Consumers', 'Routes', and 'Activities'. The main content area is titled 'Roster Record - SOA Adult day' and displays a table of client records for the month of 07/2012. The table is grouped by 'Client' and shows the following data:

| Client | Service | Total Units |
|----------------------------|------------------------|-------------------|
| State1, State1 (501461234) | | Total units: 0.00 |
| State1, State1 (501461234) | HCB Adult Day Services | |
| Test, Ida (1360141998) | | Total units: 0.00 |
| Test, Ida (1360141998) | HCB Adult Day Services | |

Two black arrows in the image point to the 'Refresh' button and the 'Client' dropdown menu in the top left of the table area.

Tips & Short-cuts:

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

The screenshot shows the 'Consumers' list in the Harmony for Aging application. Several callout boxes provide instructions:

- This indicates which list is showing.** (Points to the 'Consumers' tab)
- This symbol shows how the column is sorted, either ascending or descending. Click on it to change the order.** (Points to the sort icon in the 'Name' column header)
- I call this a menu ribbon** (Points to the top menu bar)
- 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.** (Points to the filter icon in the 'Name' column header)
- 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.** (Points to the filter icon in the 'Name' column header)

| Row Action | Consumer Type | Active? | ID | Name | Date Registered | Address | Town of Residence | County of Residence | Home Phone | Sta |
|------------|----------------|-------------------------------------|------------|-------------------------------|-----------------|--------------------|-------------------|---------------------|----------------|-----|
| | Consumer | <input checked="" type="checkbox"/> | 1330151003 | Demo, Jane A | 01/01/2011 | 100000 Glacier Way | Juneau | Alaska (Counties) | (907) 790-5555 | 02 |
| | Consumer | <input checked="" type="checkbox"/> | 1384943133 | Demo, Martha | 01/01/2011 | | Juneau | Alaska (Counties) | | 02 |
| | | | | Family Caregiver Outreach | 07/03/2006 | | | | | |
| | | | 348696082 | 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 | <input checked="" type="checkbox"/> | | State of Alaska Presentations | 01/01/2011 | | | | | |
| | Consumer Group | <input checked="" type="checkbox"/> | | State of Alaska testing | 07/01/2012 | | | | | |
| | Consumer | <input checked="" type="checkbox"/> | 501461234 | State1, State1 | 05/30/2006 | 1220 Glacier | Juneau | Alaska (Counties) | (907) 321-4567 | |
| | Consumer | <input checked="" type="checkbox"/> | 101300898 | State2, State2 | 06/13/2006 | 1001 Main Street | Juneau | Alaska (Counties) | | |
| | Consumer | <input checked="" type="checkbox"/> | 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.

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 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. 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.