

Training: Job Aid

SAMS Training Social Assistance Management System

Call Sessions



SPURS Project

Department of Aging and Disability Services (DADS)



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Symbols Used in this Training Manual

	<p><u>TIP</u> Tips provide general recommendations on how to make it easier or more productive to use SAMS.</p>
	<p><u>CAUTION</u> Caution highlights areas of note where special attention to detail may be important to your success with SAMS.</p>
	<p><u>NOTE</u> Notes provide additional information of general interest about a specific function or process of the SAMS application.</p>
	<p><u>EXAMPLE</u> Examples are provided to help you develop a better understanding of how SAMS may be used in a “real life” situation.</p>
	<p><u>MINIMUM DATA REQUIREMENTS</u> Minimum Data Requirements are provided to give you a list of the minimal data to be entered into SAMS to meet the Department of Aging and Disability Services (DADS) requirements. How to enter the data into SAMS follows the Minimum Data Requirements list. Minimum Data Requirements fields are in boldface type. Area Agencies on Aging may choose to enter additional data concerning the consumer and are not limited by DADS minimum requirements.</p>
	<p><u>QUICK LIST</u> Quick Lists are provided as a fast reference listing of steps to take to access SAMS or enter data, without in-depth detail.</p>

Introduction

This reference manual provides “quick reference” information for State Unit on Aging Programs Uniform Reporting System (SPURS) users providing Information, Referral and Assistance and is a supplement to the SAMS User Training for the entry of Call Sessions.

Scope of Job Aid

This Job Aid is designed to supplement SPURS User Training for the entry Information, Referral and Assistance Call Sessions. The content documents the ideal work flows for documenting Information, Referral and Assistance, and the system reports associated with that service. The material serves as a reference and outlines “how to”:

- Log in to Agingnetwork.com.
- Log in to SAMS.
- Log a “Quick Call.”
- Log a Comprehensive Call and Call Session Details.
- Document:
 - Types of Calls
 - Call Topics
 - Referrals
 - Activities
 - Assessments
 - Information, Referral & Assistance Service Deliveries using Templates
- Run Reports.

Users of this Job Aid should be familiar with the structure of Consumer Records in SPURS and DADS’ client intake procedures for data requirements.

Illustrations and Graphics

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

Additional Resources

This training manual only provides a general overview to entering Information, Referral and Assistance Call Sessions. It does not attempt to provide complete system information.

SAMS has an online help system and printable manual. After logging in, press F1, or use the Help menu to access an indexed help system with step-by-step procedures.



Note: This manual assumes you have previous training and/or experience with SAMS. Refer to the Core SAMS Training Manual for general information as needed.



Note: "SAMS" refers to Harmony Information Services, Inc.'s Social Assistance Management System. "SPURS" refers to the project implementation of SAMS in the State of Texas, known as the State Unit on Aging Programs Uniform Reporting System.

For questions, please contact your Area Agency on Aging SAMS Administrator. When the Area Agency on Aging SAMS Administrator cannot assist you, the Administrator should send questions to the DADS Help Desk at T3Ahelp@dads.state.tx.us (use control+click to follow this link).



Quick List – Login and Signing in to SAMS

1. Launch **Internet Explorer**.
2. Go to <http://www.agingnetwork.com>.
3. Click **Go to Customer Login**.
4. Enter your assigned *AgingNetwork* **Username** and **Password**.
 - Your Username is your "TXDADS" number.
 - If you forget your Password, your local SAMS administrator must contact Harmony Information Systems to request a password reset.
5. Click on the **Log In** button.
6. Click on the **SAMS Production** folder.
7. Click on the **SAMS** icon to start the application.
8. Enter your assigned SAMS **Username** and **Password**.
 - If you forget your SAMS Password, your local SAMS administrator must contact DADS to request a reset.
9. Click **OK**.



DADS MINIMUM DATA REQUIREMENTS

Information, Referral & Assistance

- a. Assign the correct **Caller Type**.
- b. Show caller as **Consumer**, if applicable.
- c. Select the applicable **Age Group**.
 - Age group is a program qualifier for persons 60/+, caregivers, and consumers receiving services funded by the Centers for Medicare and Medicaid Services. This element is required for all callers for whom units of service are reported.
- d. Record the **Start Date**.
 - If data entry is occurring after the event, ensure that the date reflects the date of service rather than the date of entry to the system.
- e. Enter details under **Call Notes** for every communication with or on the behalf of an eligible individual, regardless of the type of contact (initial, follow-up, accessing services).
- f. Record **Service Deliveries**.
- g. Mark Call as **Complete** when activities are final. **Call Notes** must be sufficient to indicate the reason for the inquiry, actions taken, whether follow-up is needed and was provided, and the final resolution of the call.
- h. **Report** total Contacts and Estimated Persons Count.
- i. Enter **Service Groups** when the AAA is tracking the above information through a different Information, Referral and Assistance system.



Quick List – Entering IR&A to meet DADS Minimum Requirements

1. Once you are in SAMS, click the **New Call** button.
2. Click on **Caller Type** and select from the drop down menu. If the default selection of **(Self)** is retained, the **Consumer** selection will populate with the caller automatically.
3. Click on **Consumer** if caller is different from the person needing assistance.
4. Click on **Age Group** and select from the drop down menu. The Age Group selected is for the person needing assistance. Age Group and Gender will populate automatically if the consumer's Date of Birth and Gender are already in SAMS.
5. Note the **Start Date**. Adjust if data is being entered on a date which is later than the date of service by clicking on the date field.
6. Click the **Complete?** field to set the call completion status. Mark complete when all activities for the caller are final.
7. Click the **Notes** field to enter any comments about the call session.
8. Click **Save and Close**.
9. Record **Service Deliveries** by clicking the box on the appropriate template, using the template screen.
10. Click **OK** to generate the delivery record for the call's consumer.

DADS Definition and Other Information: Information, Referral and Assistance (IR&A)

1. Definition

Information, Referral and Assistance consists of activities such as assessing the needs of the inquirer, evaluating appropriate resources, assessing appropriate response modes, indicating organizations capable of meeting those needs, providing enough information about each organization to help inquirers make an informed choice, helping inquirers for whom services are unavailable by locating alternative resources, when necessary, actively participating in linking the inquirer to needed services, and following up on referrals to ensure the service was provided.

- **Unit of Service**: One Contact. Count one contact for every communication with or on the behalf of an eligible individual, regardless of the type of contact (initial, follow-up, accessing services).

and

- **Estimated Persons Count**: Count only the initial contact during a reporting month for each eligible individual.

2. What funds may be expended for Information, Referral and Assistance?

Users should refer to the “Services and Allowable Funding Sources” available on the DADS website. In 2012, the following funds may be expended for Information, Referral and Assistance:

- Title III-B
Title III-E
Title VII-Elder Abuse Prevention (EAP)
Centers for Medicare and Medicaid Services (CMS)
Disaster Relief, as approved by DADS
Medicare Improvements for Patients and Providers Act (MIPPA)
State General Revenue (SGR)
State General Revenue Additional Other (SGR Other)

3. Who is eligible for Information, Referral and Assistance?

Different funding sources result in different eligibility requirements for people served by the AAA. How the AAA budgets its funds under IR&A determines how the AAA will collect and report eligible units of service to DADS.

Title III-B (AoA) or State General Revenue (SGR): Record and report contacts and estimated persons for the following:

- Eligible individuals include persons who are age 60 or older, and individuals calling on behalf of a person who is 60 or older. Examples of other individuals include family, friends, caregivers, neighbors, and health or social services staff.

Title III-E (AoA) and State General Revenue (SGR) used to match Title III-E (State): Record and report contacts and estimated persons for the following:

- Eligible individuals include persons who are:
 - Age 18 or older caring for an individual age 60 or older;
 - Age 18 or older caring for an individual of any age who has Alzheimer's disease and related disorders with neurological and organic brain dysfunction;
 - Age 55 or older and are grandparents or older relative caregivers of persons up to age 18; or
 - Age 55 or older and are grandparents or older relative caregivers of persons who are age 19 to 59 with a disability.

Title VII-Elder Abuse Prevention (AoA/EAP): Record and report contacts and estimated persons for the following:

- Eligible individuals include persons who are age 60 or older, and individuals calling on behalf of a person who is 60 or older. The issue discussed must relate to Elder Abuse Prevention (EAP).

Centers for Medicare and Medicaid Services (CMS): Record and report contacts and estimated persons for the following:

- Eligible individuals include persons who are:
 - Medicare beneficiaries;
 - New to Medicare enrollees;
 - Dual Eligible Medicare beneficiaries; or
 - Beneficiaries who are disabled as determined by Social Security Administration (SSA) criteria.

The issue discussed with an eligible individual must be related to a CMS topic.

- Eligible individuals who are age **60 and over** will be reported using a template in SAMS which maps the unit of service to a NAPIS activity.
- Eligible individuals who are under age 60 will be reported using a template in SAMS which does not map the unit of service to a NAPIS activity, if the AAA wishes to track these units in SAMS.



Note: Units of service provided for an **individual of any age who meets CMS criteria**, must be reported on the Individual Client Contact (ICC) form in SAMS. The ICC requires reporting of time spent in hours and minutes on NPR and total time in minutes in SAMS.

Medicare Improvements for Patients and Providers Act (MIPPA): Record and report contacts and estimated persons for the following:

- Eligible individuals include persons who are Medicare beneficiaries, or a new to Medicare enrollee, or a beneficiary who is disabled as determined by SSA criteria.
- Eligible individuals who are age **60 and over** will be reported using a template in SAMS which maps the unit of service to a NAPIS activity.
- Eligible individuals who are under age 60 will be reported using a template in SAMS which does not map the unit of service to a NAPIS activity, if the AAA wishes to track these units in SAMS.

The issue discussed with the caller must be related to Low Income Subsidy (LIS), Medicare Savings Program (MSP) or other MIPPA issues.



Note: Units of service provided for an **individual of any age who meets CMS criteria**, must be reported on the Individual Client Contact (CC) form in SAMS.

4. What data does DADS require to be reported for the Quarterly Performance Report (QPR) for Information, Referral and Assistance?

- Units of Service
- Estimated Persons Count (Initial Contact) for 60+ persons
- When funded by Title III-E, the AAA must report:
 - “Estimated Unduplicated Caregivers”
 - “Estimated Unduplicated Grandparents/Other Older Relatives”

5. What data does the Administration on Aging (AoA) require to be reported for Information, Referral and Assistance?

The Administration on Aging (AoA) requires data be reported annually using the National Aging Program Information System (NAPIS) in accordance with AoA’s “Reporting Requirements for Title III and VII.” The following is a list of AoA terms and reporting requirements for Information, Referral and Assistance:

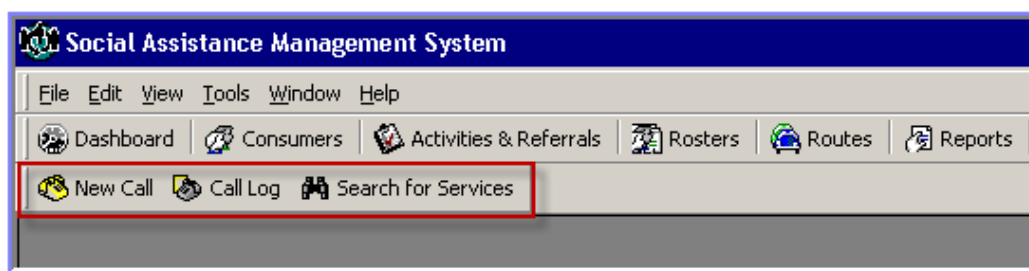
- Service Name: Information and Assistance
- Unit of Service: 1 Contact
- When funded by Title III-E, the AAA must report:
 - “Estimated Unduplicated Caregivers”
 - “Estimated Unduplicated Grandparents/Other Older Relatives

Call Session Overview

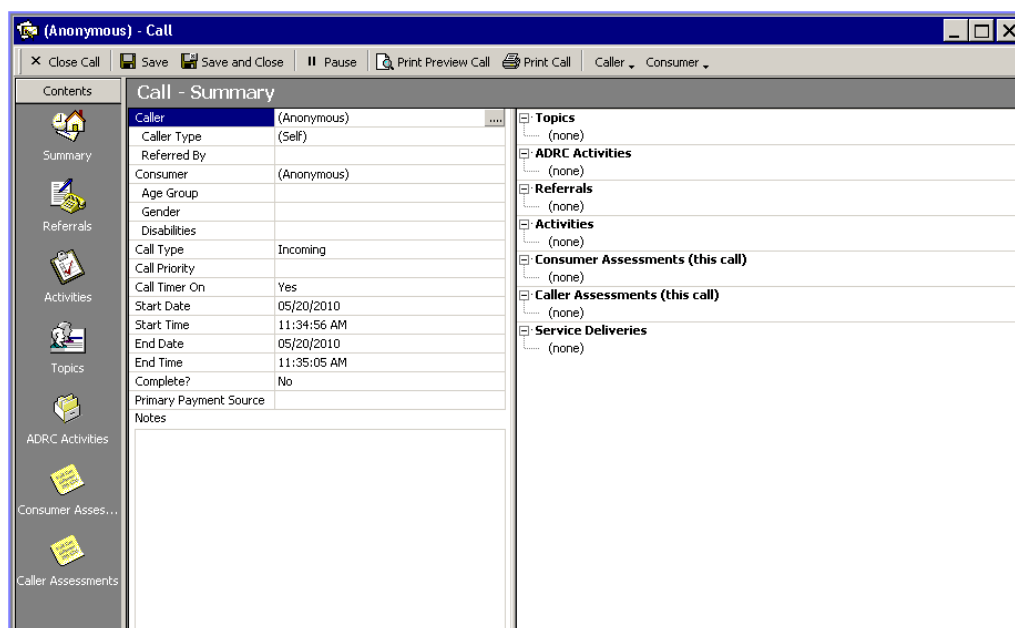
The Call Session of SAMS IR (Information and Referral) is the primary section of SAMS for tracking contacts that can represent the initial service or information request from a potential Consumer.

To access the Call Session functionality, Users must be given access by the SAMS Administrators at the local Agency or DADS.

Below is a screenshot showing the SAMS IR toolbar:



A new call session is started by clicking the **New Call** button, at which time the following summary screen is displayed. The layout of the call session is similar to the consumer record area of SAMS, with a navigation pane on the left and the sections for detailed data entry in the main working window:



Call Details

The call summary screen includes a split window displaying data fields for tracking detailed specifics about the caller, consumer, and call, and access to call task tracking. These sections are also accessible from the call navigation pane on the left. All call records will track the caller, the consumer, and the relationship as defined by the different *Types of Calls* listed in the section below.

Also tracked as details of the call are the source of the call, the type and priority of the call, start and end dates/times, the call's completion status, and general notes taken on the call.

Types of Calls

SAMS IR can record many types of calls including:

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

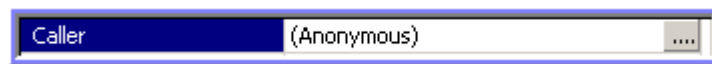
The following sections outline the process for capturing data as it pertains to SAMS. Area Agencies on Aging not using SAMS to track **individual** Information, Referral & Assistance contacts **must** collect and document the minimum data requirements described in this Job Aid.

To Enter a New Call Session with Details:

1. Click **New Call** to start a call session.



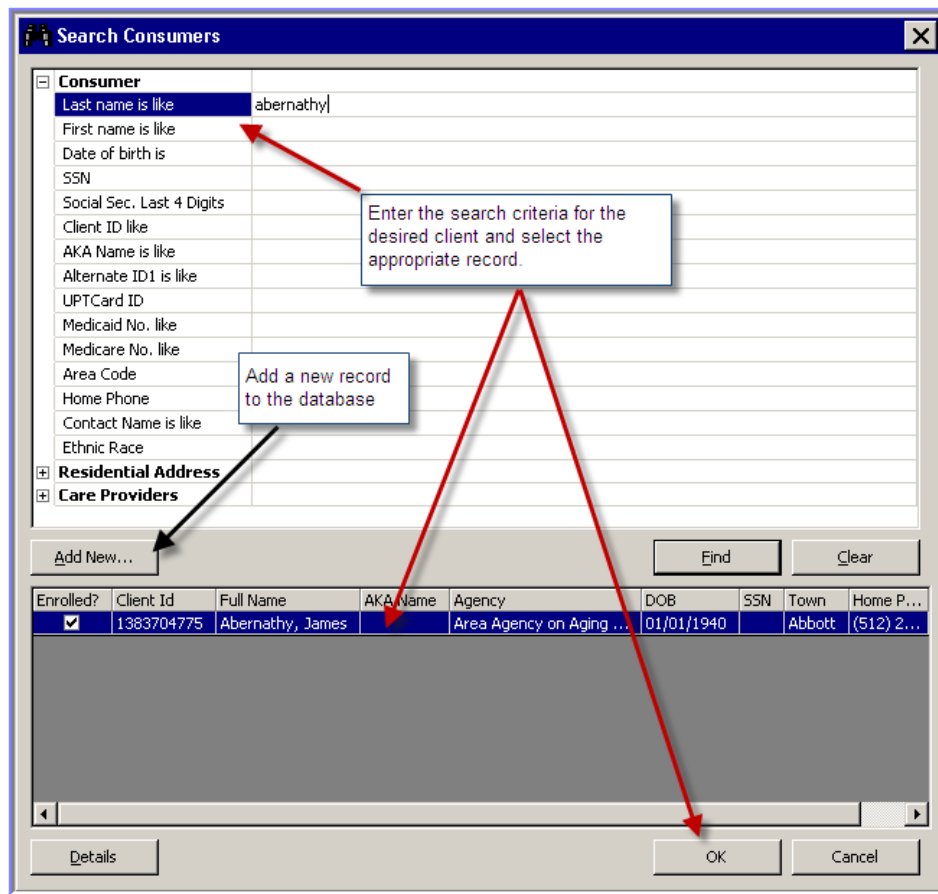
2. Select the **Caller** by browsing for an individual or by creating a new record.



To open **Search Consumers** to browse, click on the "..." or hit the space bar.



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



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

Caller	Abernathy, James
Caller Type	(Self) <input type="button" value="v"/>
Referred By	
Consumer	Abernathy, James



***Caller Type or Consumer is required by DADS.**

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

Caller	Abernathy, James
Caller Type	(Self)
Referred By	Friend/Family <input type="button" value="v"/>
Consumer	Abernathy, James

5. **Age Group***, **Gender** and **Disabilities** can be selected if desired for more detail on the consumer selected. Age Group and Gender will populate automatically if the consumer's *Date of Birth* and *Gender* already in the SAMS database.

Consumer	Abernathy, James
Age Group	
Gender	Male
Disabilities	Physically Disabled <input type="button" value="..."/>



***Age Group is required by DADS.**

6. Select the appropriate **Call Type** and the call's level of urgency in the **Call Priority** dropdowns.

Call Type	Incoming
Call Priority	Urgent: Needs assistance/action within ...

7. Note the **Start Date*/Time** and **End Date/Time**; especially the **End Time** that is current and being tracked live. Adjust if necessary.

Call Timer On	Yes
Start Date	05/19/2010
Start Time	04:21:39 PM
End Date	05/19/2010
End Time	04:27:34 PM



***Start Date is required by DADS.**

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

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



***Complete is required by DADS when activities are final.**

9. Select an optional **Primary Payment Source** for the service.

Primary Payment Source

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

Notes
James wants more information about meal services offered at the local meal site as well as the options for receiving Home Delivered Meals.
We discussed some basic eligibility requirements and where the local meals sites were located. He would like to continue the process to see if there are other needs that other services offered could accommodate.



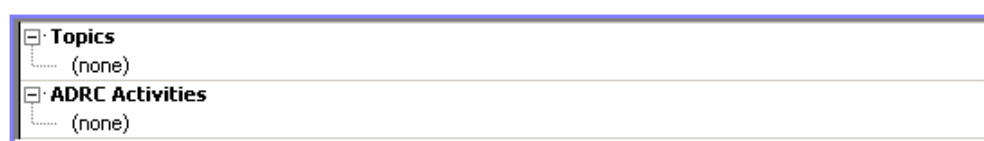
***Notes are required by DADS.**

11. Review completed call details.

Call - Summary	
Caller	Abernathy, James
Caller Type	(Self)
Referred By	Friend/Family
Consumer	Abernathy, James
Age Group	
Gender	Male
Disabilities	Physically Disabled
Call Type	Incoming
Call Priority	Urgent: Needs assistance/action within ...
Call Timer On	Yes
Start Date	05/19/2010
Start Time	04:21:39 PM
End Date	05/19/2010
End Time	04:33:08 PM
Complete?	No
Primary Payment Source	
Notes	
James wants more information about meal services offered at the local meal site as well as the options for receiving Home Delivered Meals.	
We discussed some basic eligibility requirements and where the local meals sites were located. He would like to continue the process to see if there are other needs that other services offered could accommodate.	

Call Topics & Aging and Disability Resource Center Activities (Call Outcomes)

On the right-side pane of the call summary screen are sections to track list attributes of the call data. An example is the ability to record predefined items for any topics discussed within the duration of the call, with optional times associated, as well as any outcomes of the call session.

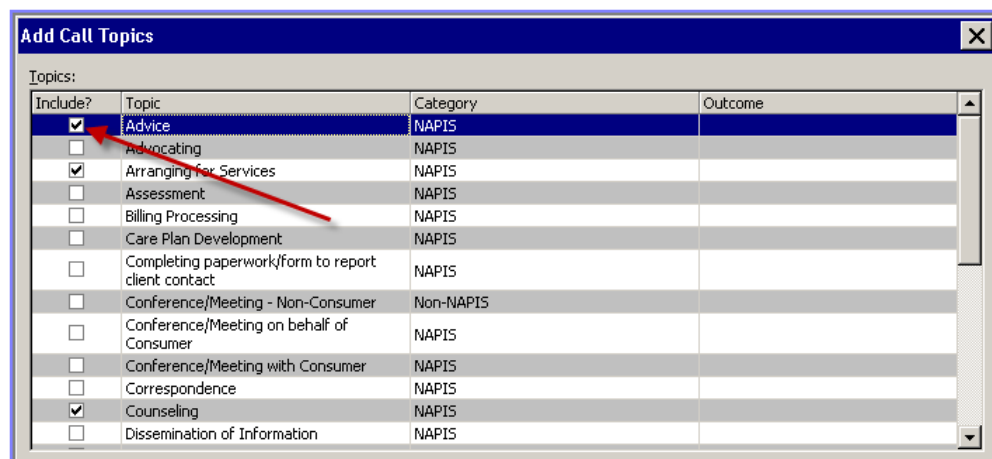


<input type="checkbox"/> Topics	(none)
<input type="checkbox"/> ADRC Activities	(none)

To add any items to these lists, simply double-click on the section and select the appropriate items to add. Alternately access each section in the navigation pane on the left and add the items using the *Add* button on the toolbar.

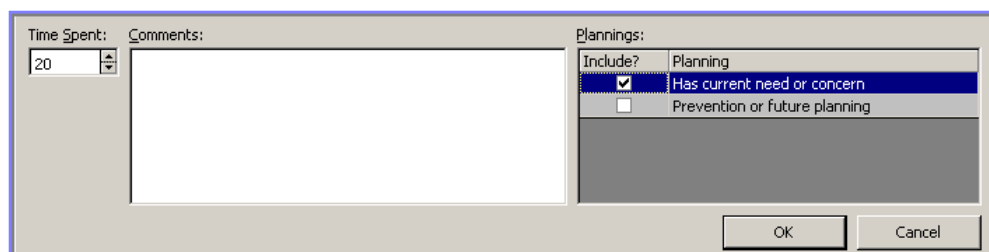
To add a new call topic or Aging and Disability Resource Center activity outcome:

1. Continuing with the call session already started, double-click the section for **Topics**. Choose the desired items by checking the appropriate boxes in the top section of the **Add Call Topics** window.



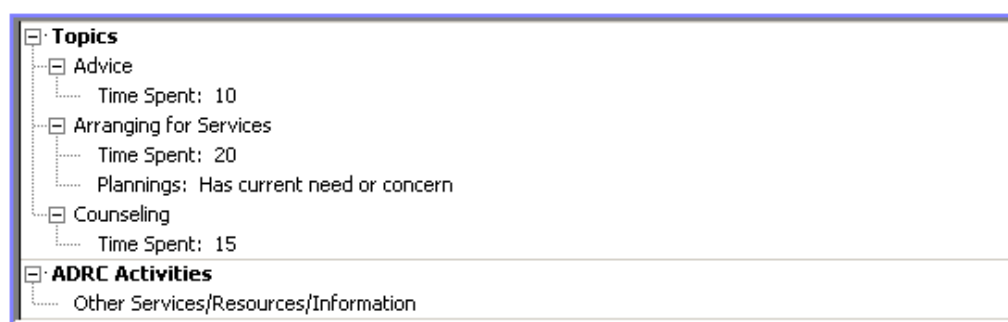
Include?	Topic	Category	Outcome
<input checked="" type="checkbox"/>	Advice	NAPIS	
<input type="checkbox"/>	Advocating	NAPIS	
<input checked="" type="checkbox"/>	Arranging for Services	NAPIS	
<input type="checkbox"/>	Assessment	NAPIS	
<input type="checkbox"/>	Billing Processing	NAPIS	
<input type="checkbox"/>	Care Plan Development	NAPIS	
<input type="checkbox"/>	Completing paperwork/form to report client contact	NAPIS	
<input type="checkbox"/>	Conference/Meeting - Non-Consumer	Non-NAPIS	
<input type="checkbox"/>	Conference/Meeting on behalf of Consumer	NAPIS	
<input type="checkbox"/>	Conference/Meeting with Consumer	NAPIS	
<input type="checkbox"/>	Correspondence	NAPIS	
<input checked="" type="checkbox"/>	Counseling	NAPIS	
<input type="checkbox"/>	Dissemination of Information	NAPIS	

2. Enter an optional **Topic Time, Comments** regarding the topic and any specified need for **Planning** around the topic in the bottom half of the window.



Include?	Planning
<input checked="" type="checkbox"/>	Has current need or concern
<input type="checkbox"/>	Prevention or future planning

3. Click **OK** to commit the added items checked.
4. Double-click the section for **Aging and Disability Resource Center Activities** and choose the desired items by checking the appropriate boxes in the list.
5. Click **OK** to commit the added items checked.
6. Review lists of items added for Topics and Aging and Disability Resource Center Activities.



- [-] **Topics**
 - [-] Advice
 - Time Spent: 10
 - [-] Arranging for Services
 - Time Spent: 20
 - Plannings: Has current need or concern
 - [-] Counseling
 - Time Spent: 15
- [-] **ADRC Activities**
 - Other Services/Resources/Information

Referrals

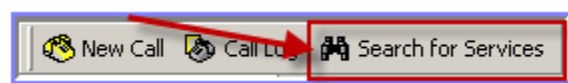
During a call session, the caller may request specific information about an organization. The worker can track a referral made to a provider, when the provider is entered as a resource in the SAMS Administrative setup.

To add a new referral:

1. Continuing with the call session already started, double-click the section for **Referrals** to bring up the **Search for Services** window.

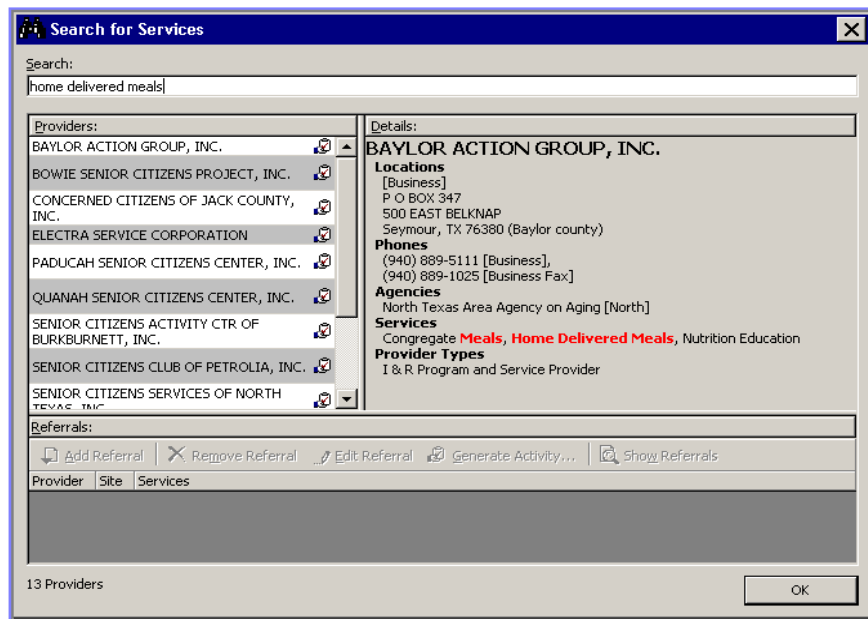


Note: The **Search for Services** function can also be accessed from the IR toolbar of SAMS and used to initiate a call session.

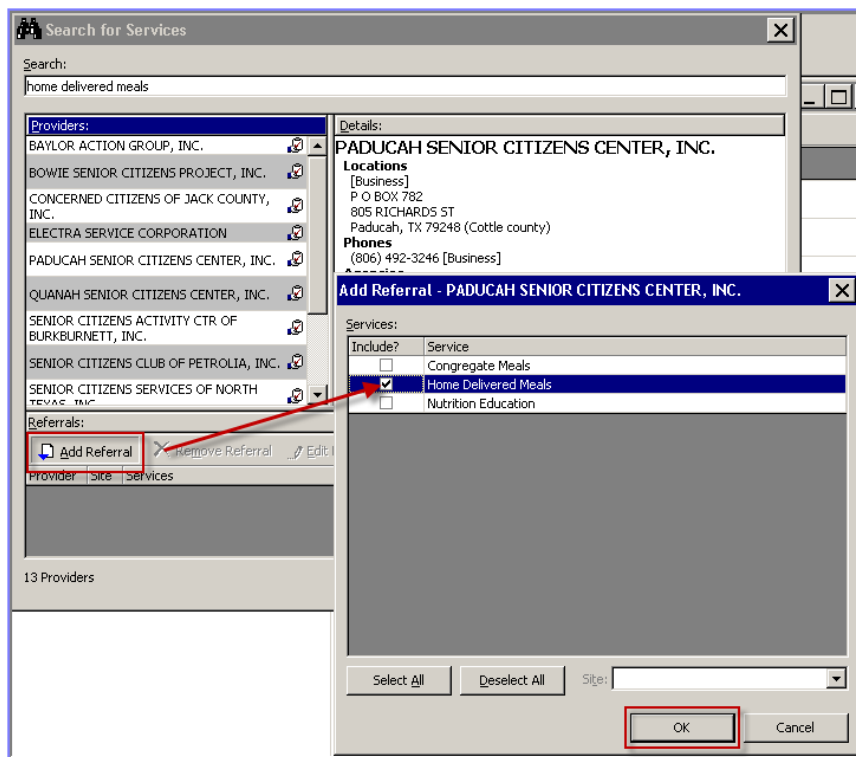


2. In the **Search** field at top of the window, type in any searching criteria for the provider organization for which you wish to create a referral such as the provider name, service names, location data, or any other identifiable attribute. The search results will populate as you type.

Continue to type additional search words to narrow the resulting list of providers.

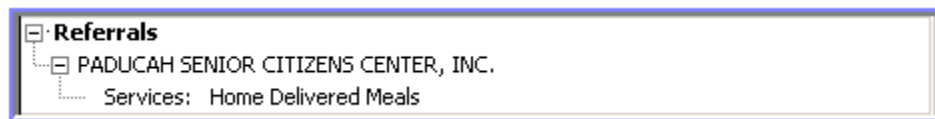


- To add a referral to the call session, select the desired provider in the list of results in the left-hand window and click **Add Referral** in the bottom window. Check the appropriate service(s) that are being referred to the caller, if any.



4. Click **OK** to commit the service to the referral.

5. Repeat for additional referrals and click **OK** to commit the referral items to the call summary.



Activities

A call session may result in a task that needs to be completed by the user taking the call or by another person within or outside their department or organization. Activities are used as a primary source of electronic communication and task management. This section of the call session allows the worker to create a task as a follow up to the call.



Note: The steps outlined below are recommended best practices with the fields to track. Other fields can be utilized for specific needs and purposes.

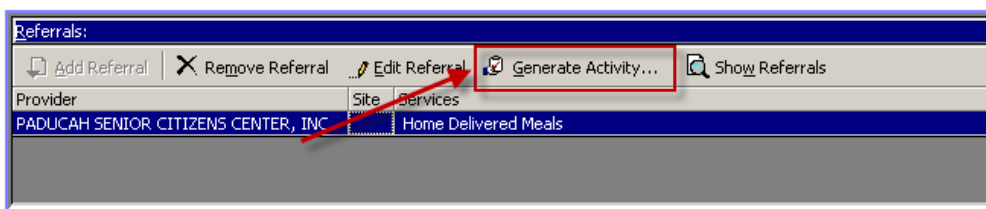
To add a new call activity:

1. Continuing with the call session already started, double-click the section for **Activities** to initiate an activity record.

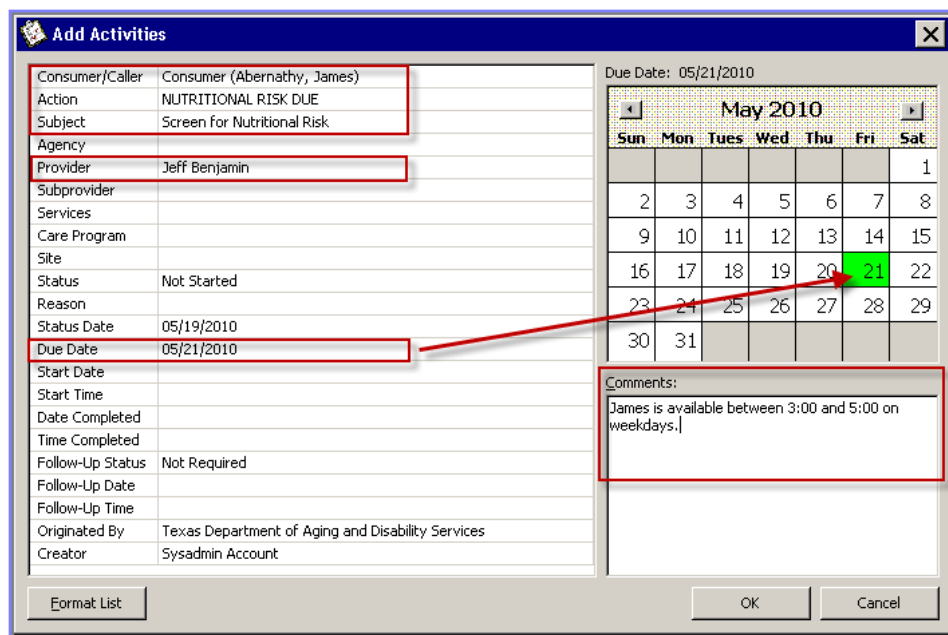
May 2010						
Sun	Mon	Tues	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



Tip: An activity record can also be automatically generated during a referral of a service provider by clicking **Generate Activity** in the referral toolbar. **Click** on Provider before taking an action such as editing or generating the activity.



2. Select the **Consumer** or **Caller** to link the activity record to.
3. Select the categorization of the activity in the **Action** dropdown list.
4. Enter a **Subject** for the activity.
5. Select the organization or care manager to assign to the task in the **Provider** dropdown list. In SAMS the term "care manager" is used for all staff, including Benefits Counselors.
6. Set a **Due Date** for the activity by entering the date or clicking the date on the calendar on the right-hand window.
7. Enter **Comments** to further explain related information or needs.



8. Click **OK** to commit the activity record to the call summary.

Assessments

In SAMS, an assessment is a function to gather data in a question/response form. The terminology in the SPURS implementation for Texas would refer to these assessments in SAMS as the *Nutritional Risk Assessment*, *Consumer Needs Evaluation* and *Caregiver Assessment* (SB 271). There are additional assessments created for the State Health Insurance Program *Individual Client Contact form* and *Public and Media Events form* as well.



Note: The steps outlined below are examples of assessment sessions initiated in a call session. Assessments can also be created from the consumer record.

To add an assessment to the call:

1. Continuing with the call session already started, double-click the section for **Consumer Assessments** to initiate an assessment session.



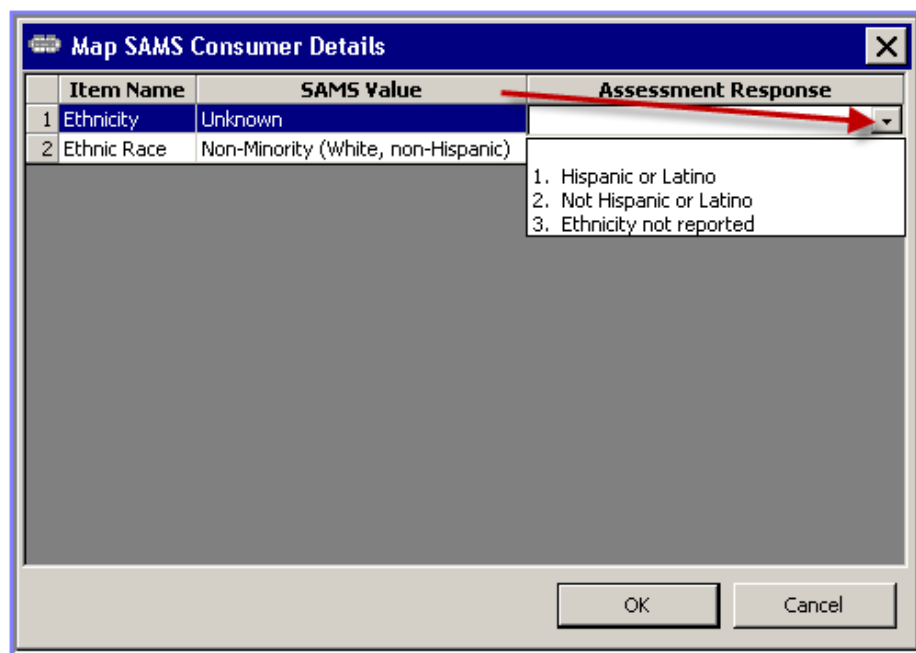
Tip: an assessment can also be created for the **Caller** following the same steps.

2. Select the appropriate form in the **Filename** field. The application will retain previously selected forms in the dropdown, or select **Browse** to find the form in the folder: S:\Omnia\Assessment Forms\ .
3. Select your organization in the appropriate **Agency** or **Provider** dropdown.
4. Set the **Date of Assessment**, if different from the current date.
5. Set the **Next Assessment Date**, if appropriate, or delete and leave blank if no follow up assessment needs to be performed.

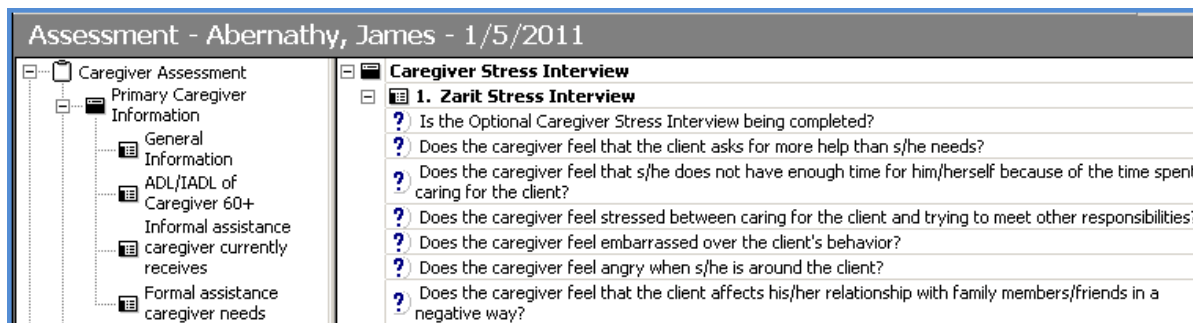
6. Enter the name of the **Assessor**.

Details:	
Assessment Form	
Filename	S:\OMNIA\ASSESSMENT FORMS\TX-DADS I...
Name	TX-DADS Intake
Author	Alison S. Rosenblum
Last Updated	5/7/2010 11:46:25 AM
Version	1
Organization	
Care Program	
Agency	Area Agency on Aging of North Texas
Provider	
Subprovider	
Site	
Assessment	
Date of Assessment	05/19/2010
Next Assessment Date	05/19/2011
Assessor	Jeff Benjamin
Password	
Verify Password	
Comments	
<input type="text"/>	

7. Click **OK** to create the assessment. Depending on the form selected, you may be presented with a prompt to **Save** the assessment to utilize indicator calculations; click **Yes** if prompted to do so.
8. Depending on the form and data entered in the consumer record, you may be brought to a **Map SAMS Consumer Details** dialog to populate response data in the form. Map the appropriate data fields if desired and click **OK**, or click **Cancel** to start the assessment without populating response data.



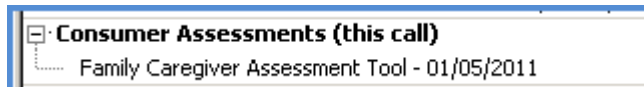
- Complete the assessment session by responding to all appropriate questions in the form (see the **Core SAMS Training Manual** for more information on assessment functionality).



10. Click **Save and Close** to complete the assessment process.



Tip: It is good practice to click **Save** regularly when completing an assessment to commit changed data to the database.



Service Deliveries*



***Service Deliveries are required by DADS.**

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

The automated delivery creation utilizes functionality in SAMS for **Service Templates** which allows the users to create service deliveries consistently by choosing pre-defined criteria from a list of templates. Where the services will be generated is dependent on the existence of a consumer (note the **Types of Calls** outlined in the *Call Details* section).

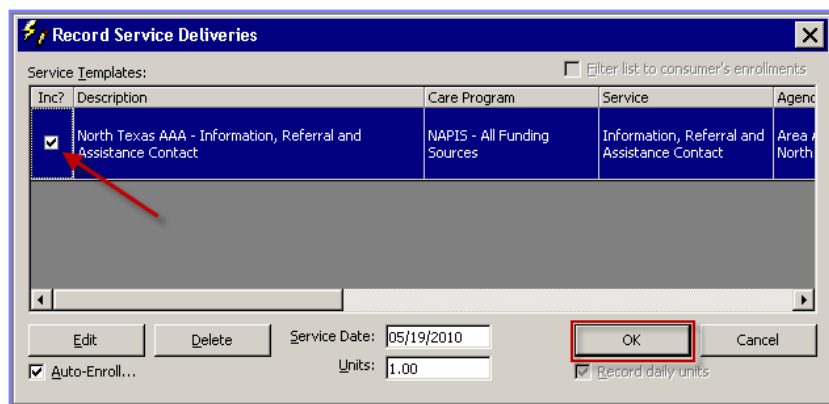
In the most common scenario set in SAMS, call sessions containing an anonymous consumer will have service deliveries generated in a pre-defined aggregate consumer group, while a known consumer will have services generated in his or her consumer record.



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

To record a service to the call:

1. Continuing with the call session already started, verify that all data has been captured in the appropriate fields and sections of the call and click **Save and Close**.
2. On the **Record Service Deliveries** template screen, select the pre-defined template accordingly. If your organization's template is not available to be selected, ask your SAMS Administrator to have it created.



The screenshot shows the 'Record Service Deliveries' dialog box. It features a table with the following columns: 'Inc?', 'Description', 'Care Program', 'Service', and 'Agency'. The first row is selected, and a red arrow points to the checkmark in the 'Inc?' column. The 'OK' button is highlighted with a red box.

Inc?	Description	Care Program	Service	Agency
<input checked="" type="checkbox"/>	North Texas AAA - Information, Referral and Assistance Contact	NAPIS - All Funding Sources	Information, Referral and Assistance Contact	Area North

Buttons: Edit, Delete, Service Date: 05/19/2010, OK, Cancel

Checkboxes: Auto-Enroll..., Record daily units

3. Click **OK** to generate the delivery record for the call's consumer (or consumer group if anonymous).
4. By using **Record Service Deliveries** your organization will be able to run a monthly report which will automatically calculate **Contacts** and **Estimated Persons Count**.

Existing Call Notes

This section of the call record will display a list of any past communication **Notes** tracked in call sessions for the same consumer in the current call. This section is very beneficial to allow the call taker to view notes entered in previous sessions without having to close and access multiple call records.

Existing Call Notes for Abernathy, James

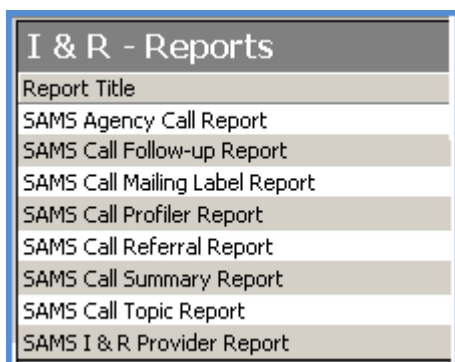
- 5/12/2010 11:57:21 AM - James called to see about Home Delivered Meal services in his area. Said he would call back later in the week.

Completed Call Summary Example

Call - Summary	
Caller	Abernathy, James
Caller Type	(Self)
Referred By	Called Before
Consumer	Abernathy, James
Age Group	
Gender	Male
Disabilities	Physically Disabled
Call Type	Incoming
Call Priority	
Start Date	10/28/2010
Start Time	11:10:48 AM
End Date	10/28/2010
End Time	11:48:25 AM
Complete?	Yes
Primary Payment Source	
Notes	Completed Family Caregiver Assessment with Mr. Abernathy today.
	<ul style="list-style-type: none"> <input type="checkbox"/> Topics <ul style="list-style-type: none"> <input type="checkbox"/> Arranging for Services <input type="checkbox"/> Conference/Meeting - Non-Consumer <input type="checkbox"/> ADRC Activities <ul style="list-style-type: none"> Brief or short-term services, follow-along, or ser Family Care Function Screen Long Term Care Services/Resources/Information Private Long Term Care Services Services/Resources Other Than Emergency, APS, or L <input type="checkbox"/> Referrals <ul style="list-style-type: none"> <input type="checkbox"/> PADUCAH SENIOR CITIZENS CENTER, INC. <input type="checkbox"/> Activities <ul style="list-style-type: none"> <input type="checkbox"/> Referral - PADUCAH SENIOR CITIZENS CENTER, INC. (Abernathy, James) <input type="checkbox"/> Consumer Assessments (this call) <ul style="list-style-type: none"> AAA Consumer Needs Evaluation - 10/28/2010 Family Caregiver Assessment Tool - 01/05/2011 <input type="checkbox"/> Caller Assessments (this call) <ul style="list-style-type: none"> (none) <input type="checkbox"/> Service Deliveries <ul style="list-style-type: none"> <input type="checkbox"/> Information, Referral and Assistance Contact (Abernathy, James) <input type="checkbox"/> Existing Call Notes for Abernathy, James <ul style="list-style-type: none"> 11/4/2010 11:08:20 AM - Free text 9/28/2010 3:37:04 PM - James would like to try a different meal site.

Reports

SAMS has several report templates (under Reports > I & R Reports) to assist you in managing Information, Referral and Assistance activity:



Report Title
SAMS Agency Call Report
SAMS Call Follow-up Report
SAMS Call Mailing Label Report
SAMS Call Profiler Report
SAMS Call Referral Report
SAMS Call Summary Report
SAMS Call Topic Report
SAMS I & R Provider Report

Each report can be customized to suit your needs by setting parameters where applicable.

Other reports that may be helpful can be found in Reports> Services Category.

In this section we will detail three reports of general interest:

1. Report for Estimated Audience Size and Contacts
2. SAMS Agency Call Report
3. SAMS I & R Provider Report

1. Report for Estimated Audience Size and Contacts

Step 1: Open **Reports** Section.

Step 2: Select Category: **Services**.

Step 3: Select SAMS Report: **Agency Summary Report (Totals Only)**.

Step 4: Enter Report Parameters as shown below, substituting Agency, Date Range, Title, and other elements as appropriate.

SAMS Agency Summary Report (Totals Only)
 -North Texas I&R Totals
 Report Comments:
 Parameters List:
 Report:
 Print Parameters: Selected Only
 Sort By: Client ID
 Group By: Agency
 Group per Page: No
 Sub Group By: No Sub Grouping
 Show Subservice Details: No
 Include Consumer Groups: Yes
 Service Delivery:
 Service Start Date (on or after): 01/01/2010
 Service End Date (on or before): 10/01/2010
 Agency: Area Agency on Aging of North Texas
 Service: Information, Referral and Assistance Contact, Information, Referral and Assistance Inquiry

Must include Consumer Groups to get accurate count.

Step 5: **Save** the report or do a "Save As" if you wish to establish a file name.

Step 6: **Run** the report. Audience Size and Contacts are calculated as follows:

SAMS Agency Summary Report (Totals Only) Service Period: From 1/1/2010 to 10/1/2010
 - North Texas I&R Totals

	* Consumers/ Consumer Groups	Units
Agency: Area Agency on Aging of North Texas Information, Referral and Assistance Contact	43/ 352	441
Information, Referral and Assistance Inquiry	0/ 1	3
Subtotal for Agency:	43 / 353	444
Grand Total:	43 / 353	444

Audience Size = 396
 (43 Consumers + 353 in Consumer Groups)

Contacts = 444 (units)

2. SAMS Agency Call Report

This report will give you information about your calls for a given period.

- Step 1: Open **Reports** Section.
- Step 2: Select Category: **I & R Reports**.
- Step 3: Select SAMS Report: **Agency Call Report**.
- Step 4: Enter Report Parameters as shown below, substituting Agency, Date Range, Title, Call Type, and/or other elements as appropriate.

SAMS Agency Call Report
Sample Agency Call Report
Report Comments:

Parameters List:

Report:

Print Parameters: Selected Only

Call:

Agency: Area Agency on Aging of North Texas

Call Start Date (on or after): 10/1/2010

Call End Date (on or before): 1/1/2011

Call Type: Incoming

Step 5: **Save** the report or do a "Save As" if you wish to establish a file name.

Step 6: **Run** the report.

SAMS Agency Call Report 1/4/2011

- Sample Agency Call Report

Call Priority:

No. of Calls	Call Priority
2	Urgent: Needs assistance/action within approx. 48
2	Total

Planning:

No. of Calls	Planning
10	Has current need or concern
2	Prevention or future planning
11	Total

Who made contact (Caller Type):

No. of Calls	Caller Type
24	(Self)
1	Agency
1	Organization
2	Other
1	Son/Daughter
29	Total

3. SAMS I & R Provider Report

Step 1: Open **Reports** Section.

Step 2: Select Category: **I & R Reports**.

Step 3: Select SAMS Report: **I & R Provider Report (Totals Only)**.

Step 4: Enter Report Parameters as shown below, substituting Agency, Service(s), and other elements as appropriate.

SAMS I & R Provider Report

- Sample I&R Provider Report

Parameters List:

Report:

Print Parameters: Selected Only

Format: Properties

Provider:

Service: Congregate Meals, Residential Repair, Transportation - Demand/Response

Agency: Area Agency on Aging of North Texas

Step 5: **Save** the report or do a "Save As" if you wish to establish a file name.

Step 6: **Run** the report. Each provider prints on a new page.

SAMS I & R Provider Report 1/4/2011

- Sample I&R Provider Report

SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.

Mailing Address	Business Address
Business Hours <input type="checkbox"/> Always Open (24/7) From To	Contact Email
Monday Tuesday Wednesday Thursday Friday Saturday Sunday	Active Yes Affordable
Phones	

Short Description of Program

SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.

Services Offered

Adult Day Care Half Day, Congregate Meals, Home Delivered Meals, Nutrition Education

Sites

GREEN DOOR, RED DOOR

Keywords

HOW SHOULD THIS ACTIVITY BE REPORTED?

Information, Referral & Assistance

1. On February 2, an individual calls and asks for the telephone number for the Dandy Durable Equipment Company. You provide the telephone number and the caller hangs up.

ANSWER: This contact cannot be reported to DADS or AoA through NAPIS. There is not enough information to determine eligibility. If the AAA wishes to track this anonymous call, it must record the call using a template that does not track to DADS/NAPIS.

2. On February 2, you receive a call from a female who tells you her mother, who just turned 60, is interested in congregate meals and some senior center activities. She wants the address of the Community Center of Cardona. You provide the address and the telephone number of the Center. She prefers to not give you her name or her mother's name.

ANSWER: This may be counted as a 60+ IR&A contact as the individual was calling on behalf of a person 60 or over. Let's take a look at the DADS minimum requirements (DMRs), page 6 in your Job Aid, and walk through how to enter all of the information you need into SPURS.

Caller Type	Child
Age Group	60 - 64
Start Date	February 2, 2011
Complete?	Yes. You are unable to follow up with this individual as you have no contact information.
Notes	Enter notes, example: "Provided address and telephone number to Cardona Community Center."
Save and Close	
Service Delivery	Click on the box for the appropriate template.
Click OK	Saves Service Delivery
How many contacts?	1

3. On February 17, Bonny Sox calls and says she heard on TV about a charity drive at a local church. She wants to donate but needs a ride to the church. When you ask if she is over or under 60, she says "Honey, I'm 78 years old and I'm cleaning house! Why do you ask?" You briefly tell her about Older Americans Act eligibility. You provide the number to the nearest transportation provider and ask for her phone number so you can be sure she got a ride. She provides the number.

ANSWER: This may be counted as 60+ IR&A contact as individual is 78 years old.

What is the Caller Type?	Self
What is the Age Group?	65+
What would you enter for the Start Date?	2/17/11
Would you mark this as complete? Why?	No, follow up is needed.
What would you enter in Notes?	[Description]
How many contacts?	1

4. On February 24, you call Bonny Sox to see if she was able to get a ride to the local church to make her donation. She replies "They were the nicest people, and I want to say I'm so glad I called you! Now I think I'll start going to the Senior Center too because they are starting ukulele classes and I'm from Hawaii!" You ask if there is anything else you can help her with. She says no, but she sure knows who to call if she ever needs help again, and she's going to tell all her friends about the AAA!" You thank her for the information and end the call.

ANSWER: This may be counted as 60+ IR&A contact as individual is 78 years old.

What is the Caller Type?	Self/Already in system
What is the Age Group?	65+/Already in system
What would you enter for the Start Date?	2/24/11
Would you mark this as complete? Why?	Yes, follow up is complete.
What would you enter in Notes?	[Description]
How many contacts?	1

5. On February 25, John Fender calls about his need for help with food and utility bills. He had to buy some very expensive medicines after a recent surgery and he's afraid he will not be able to afford his electric bill which he expects in a week or so. His Social Security check will not be in the bank for two more weeks. "I'm just an old guy who in my 89 years has never had to ask for help. Usually, everything's fine, it's just the medicines really took a lot of money. I hate to ask, but is there any help available?" Once you have taken his contact information, you contact three charitable organizations in town to find out the status of their programs and all can help with food or utilities. You call Mr. Fender back and provide the information.

ANSWER: This may be counted as 60+ IR&A contact as individual is 89 years old.

What is the Caller Type?	Self
What is the Age Group?	65+
What would you enter for the Start Date?	2/25/11
Would you mark this as complete? Why?	No, follow up is needed.
What would you enter in Notes?	[Description]
How many contacts?	5
	Original call = 1
	Calls to charities = 3
	Call back to consumer = 1

6. For the month of February using these five calls, how many of each of the following would you report on your Quarterly Performance Report?

Total number of Contacts: 8 (1 + 1 + 1 + 5)

Total Estimated Persons Count: 3
 Anonymous Female
 Bonnie Sox
 Johnny Fender