

# Training: Job Aid

## SAMS Training Social Assistance Management System

### Nutrition Programs



### SPURS Project

## Department of Aging and Disability Services (DADS)



**Harmony Information Systems, Inc.**  
12120 Sunset Hills Rd, Suite 500  
Reston, VA 20190

(703) 674-5100

[www.harmonyis.com](http://www.harmonyis.com)

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## Symbols Used in This Training Manual



### **TIP**

**Tips** provide general recommendations on how to make it easier or more productive to use SAMS.



### **CAUTION**

**Caution** highlights areas of note where special attention to detail may be important to your success with SAMS.



### **NOTE**

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



### **EXAMPLE**

**Examples** are provided to help you develop a better understanding of how SAMS may be used in a "real life" situation.

## Course Introduction

This Job Aid document represents a supplement to the Core SAMS End User Training for the entry of Nutrition Programs data.

In this Job Aid, you will learn about many different aspects of the SAMS software:

1. Consumer Record Entry Specific to Nutrition Data
2. Nutrition Assessment Basics
3. Service Planning
4. Recording Services in the Consumer Record
5. Rosters & the Delivery Confirmation Wizard
6. Service Suspensions
7. Route Management

If at any time you have questions, please don't hesitate to ask.

## 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 service data in SAMS. 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.

## Consumers

The following section will detail the areas of the consumer record specific to the entry of Nutrition Program data. These areas cover demographic attributes and associations, Nutrition Assessments, and service planning.



**Note:** For this Job Aid, we will assume that a Consumer Record has been created. Refer to the SAMS Training Manual for further information on creating Consumers.

## Consumer Record Details

### Consumer Details

*General* – along with important data required for accurate reporting, such as *Name, Birth Date, Gender, Home Phone* and *NAPIS* characteristics, enter a complete *Residential Address* and *Directions to Home* to support Route functionality.



**Note:** The *NAPIS* characteristic for *High Nutritional Risk* will be determined automatically as a result of completing the Nutrition Risk Assessment.

*Contacts* – Enter a Primary Contact in the details if available. This enables the option to include the Contact's name and phone number on the Route printout.

*Service Suspension* – Use Service Suspension to document service exceptions and a *Reason* for a specified time period by *Agency, Care Program, Provider, Service*. This feature is outlined in detail later.

**Assessments** – DADS has developed a Nutrition Risk Assessment to collect and maintain nutrition-related information for the client.

**Care Management** – Care plan service plans will be used to detail the service schedules and allocations for in-home services such as *Home Delivered Meals*.

**Service Orders** - Authorizes planned services such as *Home Delivered Meals*.

**Service Delivery** - Records services actually provided to a consumer.

**Routes** – Lists Consumer's association to existing Route(s) and provides functionality to quickly Add the consumer to a Route.

## Reviewing a Consumer Record

When a new client enters the Program, they will need to be added to the SAMS database in order to track all demographics, planning, notes, and services provided to the consumer. A primary step in the practice of adding a client is to Search the database to assure that the client does not already exist. Although SAMS will perform many integrity steps to prevent duplication, it will ultimately be the responsibility of the user to control the entry of the data in SAMS.

To add detail to a consumer:

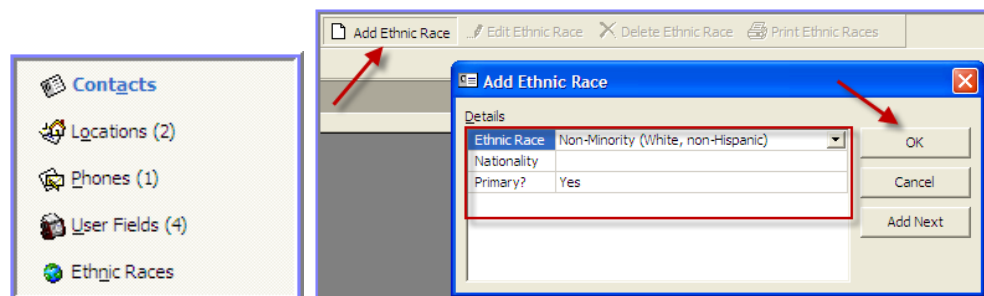
1. Enter the **Details** of the client into the appropriate demographic fields on the *General* tab. *Directions to Home* is the Residential Address is important to collect to support additional Route functionality in SAMS.

The screenshot shows the 'Abemathy, James M - Details' window. The left sidebar contains various categories like General, Contacts, Locations, etc. The main area is divided into sections: Personal, Residential Address, Mailing Address, NAPIS, Status, Insurance, Other, and Characteristics. The 'Residential Address' section is expanded, showing fields for Street 1, Street 2, County, Town, State, ZIP Code, and Municipality. A red arrow points from the 'Directions To Home' field in the 'Residential Address' section to a dialog box titled 'Directions To Home - Abernathy, James M'. The dialog box contains the text '225 house on the left after the park.' and buttons for 'Spell Check', 'OK', and 'Cancel'.



**Tip:** The fields in the Details section of the record can be customized to display only the desired demographics and in any order, so the default view displayed may be different.

2. Enter additional details for the client to track specifics of the *Contacts*, *Locations*, *Phones*, and *Ethnic Races*. On each tab, click the **Add** button in the toolbar and complete the information for the appropriate fields.



3. On the *Care Enrollments* tab, click the **Edit** button in the toolbar to view the enrollment in the default *NAPIS All Funding Sources* program. Make adjustments to the date fields as necessary and click **OK** to commit any changes.
4. Click **Save** or **Save and Close** to commit the Consumer Record changes to the SAMS database.



**Note:** Upon saving a new consumer record, SAMS will perform a set of integrity checks to prevent duplication. A **Potential Duplicate Warning** may be displayed to show existing clients in the database with attributes that match the new consumer.

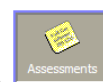


## Assessments

As a part of the nutrition intake process, it may be necessary to capture a set of data for screening the client for nutritional risk status with a snapshot of detailed information at a point in time. This is done through forms containing questions and responses using the **Assessment** functionality in SAMS and the **TX – Nutritional Risk Assessment** which is based on the standard Nutrition Screening Initiative (NSI).

To create an assessment record:

1. From within the consumer record, click on the **Assessments** button in the *Navigation Pane*.
2. Click the **New Assessment** button in the toolbar.



**Tip:** Use the **Reassess** feature to automatically populate the new assessment session with the corresponding data from the selected assessment.

3. Browse for the *TX – Nutritional Risk Assessment* form from the **Filename** field. Select the appropriate *Organization* in the **Agency** and/or **Provider** dropdowns. Then set the **Date of Assessment**, if not already set by the current date, the date the **Next Assessment** is due (if necessary), and the name of the **Assessor**.



**Note:** The default location for assessment forms on AgingNetwork is in the following location: S:/Omnia/Assessment Forms.

4. Click **OK** to start the assessment session.

- Complete the entry of all required data elements in the assessment session by navigating through the sections and subsections, and responding to the questions as appropriate.



**Tip:** Navigation through an assessment is easiest using the up/down arrow buttons on the keyboard rather than the mouse. Toggle through options of single selection dropdowns with the right/left arrows or by typing the first letter of the response.

- Complete all questions in the *Nutritional Health Determination* section. When all are answered, a **Nutritional Risk Score** will be calculated.

B. Nutritional Health Determination		
6. Do you have an illness or condition that has caused changes to the kind and/or amount of food you eat?		0. No
7. Do you eat fewer than 2 meals per day?		1. Yes
8. Do you eat fewer than five (5) servings (1/2 cup each) of fruits or vegetables every day?		1. Yes
9. Do you eat fewer than two (2) servings of dairy products (such as milk, yogurt, or cheese) every day?		0. No
10. Do you have 3 or more drinks of beer, liquor or wine almost every day?		0. No
11. Do you have tooth or mouth problems that make it hard to eat?		0. No
12. Do you sometimes not have enough money to buy food?		0. No
13. Do you eat alone most of the time?		1. Yes
14. Do you take 3 or more different prescribed or over-the-counter drugs per day?		0. No
15. Without wanting to, have you lost or gained 10 pounds in the past 6 months?		0. No
16. Are you not always physically able to shop, cook and/or feed yourself?		0. No
C. Nutritional Risk Score		
Nutritional Risk		5



**Note:** With a Nutritional Risk Score determined, SAMS will automatically populate the High Nutritional Risk indicator in the NAPIS section of the Details. SAMS will set **High Nutritional Risk** to Yes if the score is greater than or equal to 6.

7. When data entry is complete, click the **Save and Close** button on the toolbar to commit the session to the consumer record.

Abernathy, James M - Assessments					
Date of Assessment	Next Assessment ...	Assessor	Last Updated	Updated By	Assessment Form
05/03/2010	11/03/2010		05/03/2010 02:53:4...	Sysadmin	Nutritional Risk Assessment



**Tip:** For lengthy assessment forms, click the **Save** button periodically to commit changes to the database without having to close the form.

### ***Service Planning in SAMS***

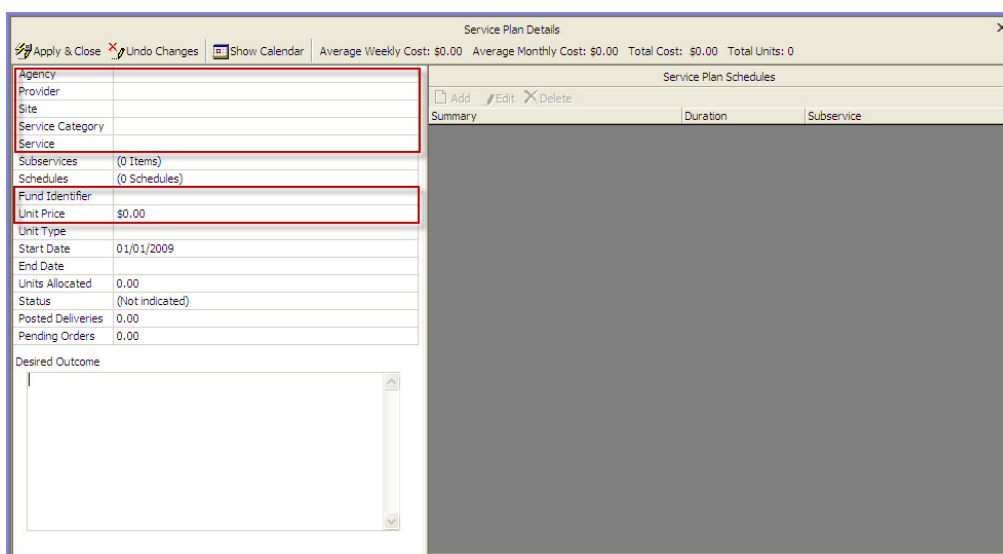
An important part of the overall plan of care for the client is to identify the services that the consumer needs and to create scheduled allocations for these needs. In SAMS, **Care Plans** can be created to encompass the needs of the clients, and within a care plan defined by a date range is a set of allocations called **Service Plans**.



**Note:** For this Job Aid, we will assume that a Care Plan has been created. Refer to the SAMS Training Manual for further information on creating Care Plans.

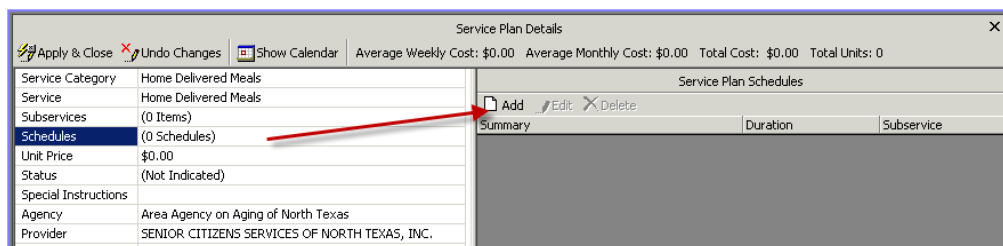
To create a new service plan allocation:

1. From within the consumer’s care plan, click on the **Service Plan** button in the *Navigation Pane*.
2. Click the **Add Service** button in the toolbar.
3. In the left pane of the *service plan*, select the attributes for the organization to provide the service in the **Agency**, **Provider**, and **Site** fields as necessary. Then select the **Service** to plan such as *Home Delivered Meals*, and select the appropriate funding source in the **Fund Identifier** field. A **Unit Price** can define the rate if it is not set automatically by contracts or the administrative setup.



**Note:** The fields displayed in the service plan can be customized to show only the desired attributes and in any order, so the default view displayed may be different.

4. Once the organization and service attributes are selected, the service **Schedule** can be set in the right pane.



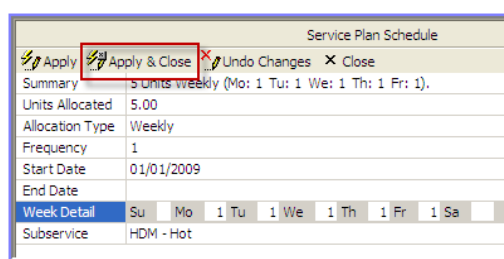
5. Click the **Add** button in the *Service Plan Schedule* section.
6. Set the appropriate attributes for the schedule as outlined in the table below.

Summary	Automatically summarizes and displays the schedule details.
Units Allocated	Automatically aggregates the planned units for weekly plans.
Allocation Type	Create the basis for the schedule between Weekly, Monthly, Annual, the dates of the Care Plan, or any Duration Specified. This must be set to Weekly for use in Routes or Confirmation sessions.
Frequency	Set to determine the frequency for which the schedule is being set (e.g., every week, every other week, every third week, etc).
Start Date	When the specific schedule is set to begin. This date must occur within the range of the care plan dates.
End Date	When the specific schedule is set to end. This date must occur within the range of the care plan dates. If left blank, the end date of the care plan will be assumed.
Week Detail	When the allocation type of <i>weekly</i> is set, enter the number of units (meals) to be planned for each day of the week.
Subservice	Select from a list of available subservices to further define the service attribute.



**Tip:** For planning *Home Delivered Meals*, an **Allocation Type** of *Weekly* should always be selected to utilize additional Route and Service Confirmation functionality.

- Click **Apply & Close** to commit the schedule to the service plan.



- Click **Apply & Close** to commit the service plan to the care plan.
- Repeat steps 2 – 8 for additional service plan allocations.
- Click **Save and Close** to commit the care plan to the consumer record.

## Service Suspensions

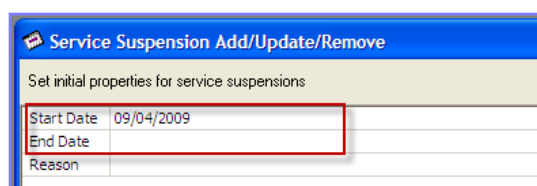
At times throughout a consumer's care there may be times that the client is temporarily not going to require or receive their services because of a situation such as a hospitalization or an organization's inability to provide the planned service.

As an alternative to modifying the service allocations in the care planning, SAMS offers functionality to create defined exception periods through **Service Suspensions**.

Follow the steps outline below to create one or more suspensions for a consumer to add the period(s) of service exception.

*To add a new service suspension:*

- From within the consumer record, click on the **Details** button in the *Navigation Pane*, and click on the **Service Suspensions** tab.
- Click **Add Service Suspensions** in the toolbar.
- Set the date range the suspension spans with the **Start Date** and **End Date** fields.





**Note:** For open-ended suspension periods, the **End Date** field can be left blank. When services are set to resume, the suspension can be modified to add the end date.

4. Select the **Reason** to categorize the suspension.

5. Enter any **Comments** for the suspension and click **Next**.
6. Select the appropriate level for the suspension(s) being created. A suspension can be created to encompass all services across an entire enrollment in a *Care Program*, all service providers for a *Service*, or suspensions can be created for each individual *Provider*.

Care Program	Service	Provider	Add	Update	Delete	Start Date	End Date	Reason
<input type="checkbox"/> Area Agency on Aging of North Texas			<input type="checkbox"/>					
<input type="checkbox"/> NAPIS - All Funding Sources	<input type="checkbox"/> (All)		<input type="checkbox"/>					
	Home Delivered Meals	<input type="checkbox"/> (All)	<input type="checkbox"/>					
		<input type="checkbox"/> SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.	<input type="checkbox"/>					

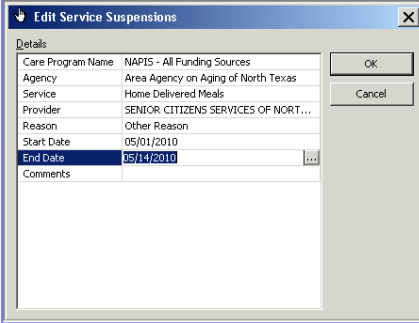


**Tip:** By creating multiple suspensions for each service and/or provider, you are given the flexibility to end suspensions separately, if necessary.

7. Click the **Save** button to generate the suspension.
8. Click the **Close** button if finished, or **Add Other Suspensions** to create additional service suspensions.

To edit a service suspension:

1. From within the consumer record, click on the **Details** button in the *Navigation Pane*, and click on the **Service Suspensions** tab.
2. Select the appropriate suspension record and click **Edit Service Suspensions** in the toolbar.
3. Make the appropriate change to the **Reason**, **Start Date**, **End Date**, or **Comments** and click **OK**.




Details	
Care Program Name	NAPIS - All Funding Sources
Agency	Area Agency on Aging of North Texas
Service	Home Delivered Meals
Provider	SENIOR CITIZENS SERVICES OF NORT...
Reason	Other Reason
Start Date	05/01/2010
End Date	05/14/2010
Comments	

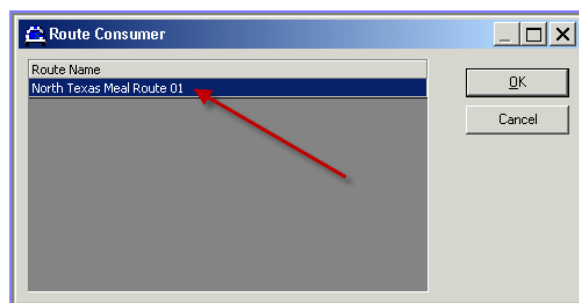


## Route Management

When a client enters the nutrition program and is set to receive *Home Delivered Meal* services, they need to be assigned to a specific driver route. Utilizing the SAMS **Route** functionality, you will easily be able to add a client to a sequencable list which can be managed and printed daily or weekly to accommodate the planned services.

To add a consumer to a route:

1. From within the consumer record, click on the **Routes**  button in the *Navigation Pane*.
2. Click the **Add to Route** button in the toolbar.
3. Select the appropriate Route and click **OK**.

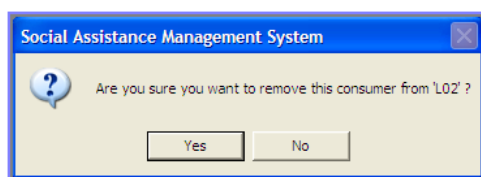


**Note:** All routes must be created before they can be selected in the assignments.

Abernathy, James M - Routes - North Texas Meal Route 01		
Route	Agency	Provider
North Texas Meal Route 01	Area Agency on Aging of North Texas	SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.

To remove a consumer from a route:

1. From within the consumer record, click on the **Routes** button in the *Navigation Pane*.
2. Select the appropriate Route in the list and click **Remove from Route**.
3. Click **Yes** to the confirmation window to complete the removal.



To sequence a consumer on a route:

1. From within the consumer record, click on the **Routes** button in the *Navigation Pane*.
2. Select the appropriate Route in the list and click **Edit Route**.



**Tip:** A route can also be accessed from the *Routes* section of SAMS.

3. A consumer newly added to a route will appear at the bottom of the list sequencing. Select the consumer row in the list and use the up and down arrows or the **Move To** button to reorder the client on the list. Alternatively click on the sequence number and drag the row up and down and release the mouse button to drop the consumer row in the new order.

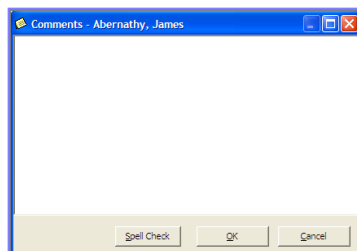


71	1300027177	GIAMA, JOSEPH	910 RAINBOW LN
72	1300020397	DAVISON, SUE	5670 WILLIAMS DRIVE
73	1300018200	THOMAS, FLOSSIE	6215 MEADOW VIEW CIRCLE
74	1321657961	Abernathy, James	222 Palm Terrace

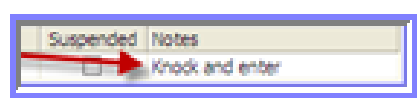
4. Click **Save** to commit the change to the database.

To add notes to a consumer on a route:

1. From within the route, select the consumer row.
2. Click the browse button in the **Notes** field.



3. Enter the comments for the consumer route notes and click **OK**.



**Note:** Any route notes entered for clients in the list are only specific to the route. Route notes do not display in the consumer record or in any other routes that the consumer may exist upon.

4. Click **Save** to commit the change to the database.

To print a route sheet:

1. From within the route, click the **Print Route** button.



**Tip:** Daily and weekly route sheets can also be printed out from the **Route** List or from the **Services** section of the **Reports**.

2. Select the option of the **Style of Route** to print. Note that the *Routes (Compact, Landscape)* style allows for the inclusion of service plan data.

**Print Routes**

Route Options | Advanced Options

Style of Route

Daily Routes

Weekly Routes

Monday - Friday

Full Week

Routes (Compact, Landscape)

Daily

Weekly

Route Daily Status

Route Mailing Label

Name Only

Page Break Between Routes

Service Period

Route Week: 08/30/2009

Select to Include in Print Out

Consumer Client ID

Suspended Consumers

Directions

Consumer Notes

Driver Notes

Consumer Phone Number

Consumer Emergency Contact / Phone

Signature Place

Consumer Barcode

Preview Print Cancel

3. Set the *Service Period* for the **Route Day** or **Week**. Then check the appropriate options to *Include in the Print Out*.
4. Click on the *Advanced Options* tab and select to **Include Service Plan** data. If desired, filters can be added to limit the results by **Service** or **Subservice**.

**Print Routes**

Route Options | Advanced Options

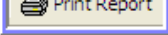
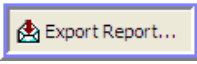
Include Service Plan

Service (Any)

Subservice (Any)

5. Click **Preview** to generate the resulting route sheet.

North Texas Meal Route 01							Sunday, 5/16/2010							
<b>Driver Name:</b>			<b>Van No.:</b>		31									
<b>Agency:</b>			<b>Provider:</b>		SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.									
<b>Seq.</b>	<b>Client ID</b>	<b>Full Name</b>	<b>Address</b>	<b>Home Phone</b>	<b>Notes</b>	<b>Service</b>	<b>Total</b>	Sun 5/16	Mon 5/17	Tue 5/18	Wed 5/19	Thu 5/20	Fri 5/21	Sat 5/22
1	1383704775	Abernathy, James M	225 East St Abbott Directions:2nd house on the left after the park.	(512) 242-7272		Home Delivered Meals	5	0	1	1	1	1	1	0

6. Click the **Print Report**  button in the toolbar to send the result to a printer, or click **Export Report**  to send the report to an electronic file such as PDF.



**Caution:** Although multiple export file options are available, the rendered image of most reports in SAMS best translates to an Adobe PDF file.

## Service Deliveries

Service deliveries in SAMS represent actual units of care provided to the consumer and are a basis for service reporting. For the Nutrition Program, services such as *Home Delivered Meals*, *Congregate Meals*, and *Nutrition Education* can be tracked and entered in a variety of different methods.

## Recording Services in the Consumer Record

Service Deliveries can be recorded in SAMS in a variety of methods from direct service entry to *Rosters* and the *Delivery Confirmation Wizard*, however it is important to note that regardless of the method of entry, all service records reside in the **Service Delivery** section of the consumer records.

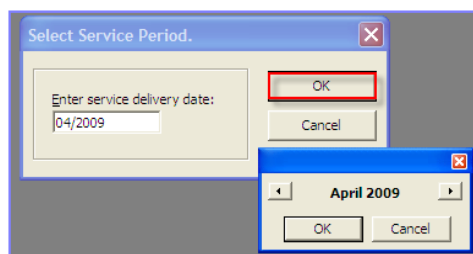
To add a new service delivery:

1. From within the consumer record, click on the **Service Delivery** button in the *Navigation* pane.
2. Click **Add Service** in the toolbar.



**Note:** Some of the data fields may be pre-populated based on defaults selected for the user. The defaults can be overridden where necessary.

3. Select the **Service Period** for the month of the service and click **OK**.

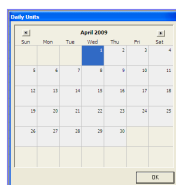


4. Select the appropriate attributes for the **Care Program, Agency, Provider, and Service**. (**Fund Identifier, Subservice, Subprovider** or **Site** can be set where appropriate as well).



**Note:** The dropdowns for most service attributes will be filtering based on the service setup in SAMS to maintain the integrity of the data entered by only allowing valid selections to be made.

5. Enter the total number of service units for the month in the **Units** field or click on the browse button to the right of the **Daily Unit Details** field, and enter the units on the individual days of service on the calendar.



6. Click **Apply and Close** in the toolbar to commit the service record to the database.

To edit an existing service delivery:

1. Click on the **Service Delivery** button in the *Navigation* pane.
2. Select the appropriate service and click **Edit Service** in the toolbar.
3. Change any desired attributes for the **Care Program, Agency, Provider,** and **Service.** (**Fund Identifier, Subservice, Subprovider** or **Site** can be set where appropriate as well).
4. If necessary, edit the total number of service units for the month in the **Units** field, or click on the browse button to the right of the **Daily Unit Details** field and enter the units on the individual days of service.
5. Click **Apply and Close** in the toolbar to commit the service record to the database.



**Tip:** For entry of additional service units for a provider in a specific month, follow the steps to edit the existing service delivery record.

### ***Delivery Confirmation Wizards for Planned Services***

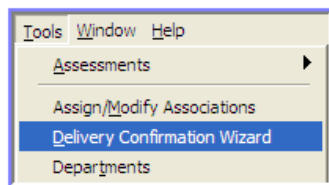
Another alternate method for entering bulk services in SAMS is using the utility called the **Service Delivery Confirmation Wizard.** This utility is used to confirm any active planned services such as *Home Delivered Meals* for consumers in the timeframe selected in the confirmation session.



**Caution:** Only services that have valid **Service Plans** in active consumer Care Plans can be recorded using the Delivery Confirmation Wizard.

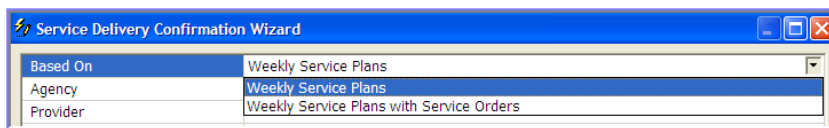
To record services using the *Delivery Confirmation Wizard:*

1. In the **Tools** menu, select the **Delivery Confirmation Wizard.**

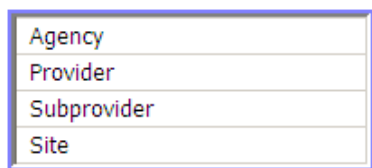


**Tip:** The confirmation wizard sessions can be run from the *Route* section in cases of planned meal services by selecting the route and clicking **Confirm Delivery** button in the toolbar.

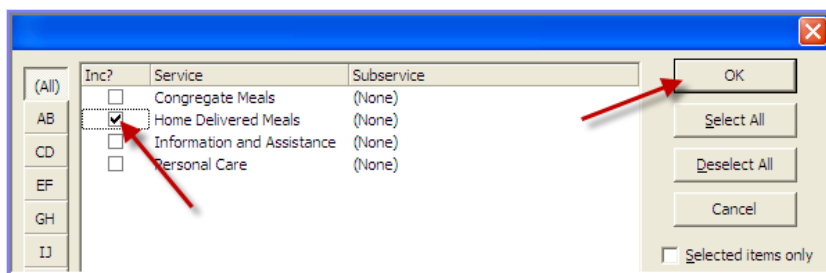
2. Select *Weekly Service Plans* in the **Based On** field.



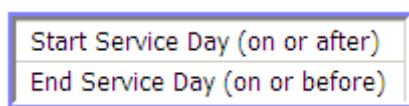
3. Select the organization information for the **Agency** and **Provider** (**Subprovider** or **Site** where appropriate).



4. Click the browse button to the right of the **Service/Subservice** field and select the desired planned services to search for during the confirmation session.



5. Set the **Start Service Day** and **End Service Day** to reflect the range to return for the planned services.



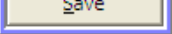
**Note:** The Start Service Day and End Service Day entered must be in the same calendar month.

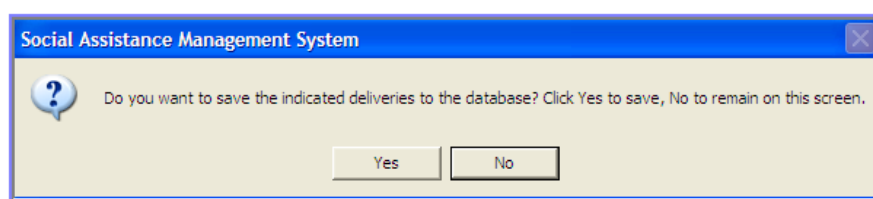
6. Click **Next**.



- Update the planned services where necessary under each individual day. Uncommitted planned services will appear in **blue**.

Service Delivery Confirmation Wizard																
Saturday, 8/1 - Saturday, 8/8   8/9 - Saturday, 8/15   8/16 - Saturday, 8/22   8/23 - Saturday, 8/29   8/30 - Monday, 8/31   All Weeks																
Seq	Name	Planned	Sat 1	Sun 2	Mon 3	Tue 4	Wed 5	Thu 6	Fri 7	Sat 8	Sun 9	Mon 10	Tue 11	Wed 12	Thu 13	Fri 14
1	Abernathy, James	21.00			1.00	1.00	1.00	1.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00
<b>Total</b>		<b>21.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>	<b>1.00</b>

- Click **Save**  then **Yes** to commit the service deliveries to the database.



- Click **Print** to retain a paper copy of the session summary, or **Close** to end the confirmation session.



## Rosters

SAMS offers functionality in the way of **Rosters** to allow for bulk data entry for consumers that are receiving the same service, which are commonly used to enter nutrition services such as *Congregate Meals*. Rosters are defined entry lists comprised of a **Roster Definition** and the functionality to **Record Service Data**. In the sections that follow, you will learn how to create a roster and how to record service deliveries using a roster.

### ***Roster Definitions***

Before a roster can be used to record service deliveries for a group of clients in SAMS, it must first be created by defining the specific attributes for the service to be delivered. Then you will set filters defining the consumers to display on the roster list.

- **What** kinds of rosters can be created?

When defining a roster, the **Type** you select will vary by clients and services:

**Multi-Service** – used to record one or many different services offered by the provider for a group of consumers meeting the criteria of the roster.

**Specified Service** – used to record only one service specified for a group of consumers meeting the criteria of the roster. The service must be selected in the **Service Properties**.

**Service Plan (Multi-Service)** – used to record one or many services based on consumer care plans. No filtering need to be set as the roster will automatically bring in only consumers with active service plans containing the same service attributes.

**Service Plan (Specified Service)** – used to record only one service specified based on consumer care plans. No filtering need to be set as the roster will automatically bring in only consumers with active service plans containing the same service attributes. The service must be selected in the **Service Properties**.

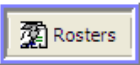
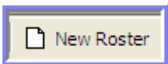
- **How** are rosters defined to create service deliveries?

As seen in previous sections, a service delivery contains various attributes that define the record. In the creation of the Roster Definition, each of the desired attributes will be set and any deliveries made to consumers via the roster will assume all of these attributes.

- **Who** are the consumers that make up the roster list?

The other half of a roster definition will be to define a criteria to determine what consumers that exist in the database will show on the roster list. There are many fields that can be used in the determination by setting filters.

To create a new Roster:

1. Click the **Rosters**  button.
2. Click **New Roster**  on the toolbar.
3. Enter a **Name** to distinguish the roster on the main list.


[-] <b>Roster</b>	
Name	
Type	
Care Program Name	
Agency	
Provider	
Subprovider	
Site	

4. Select the appropriate **Type** for the Roster.

[-] <b>Roster</b>	
Name	
Type	Multi-Service
Care Program Name	Multi-Service
Agency	Service Plan (Multi-Service)
Provider	Service Plan (Specified Service)
	Specified Service

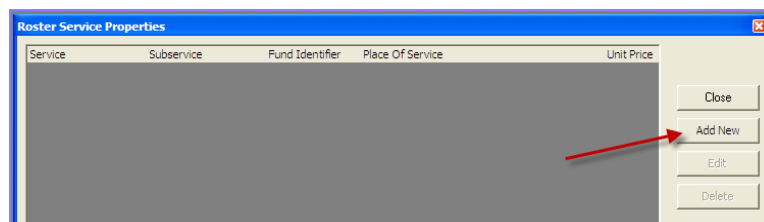
5. Select the **Care Program**, **Agency**, and **Provider** (**Subprovider** and **Site** where appropriate) to use as attributes for all services to be recorded via this roster.

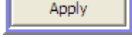
[-] <b>Roster</b>	
Name	
Type	Multi-Service
Care Program Name	
Agency	
Provider	
Subprovider	
Site	

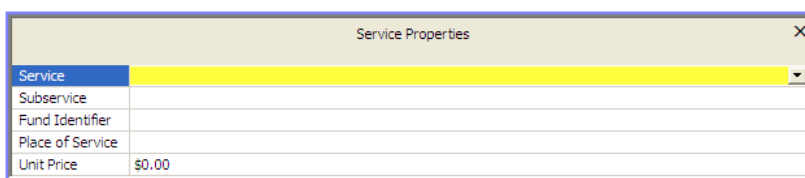
6. Click the browse  button to the right of the **Service Properties** field if service selections need to be entered.

<b>Default Service Properties</b>	
Service Properties	

- On the **Roster Service Properties** window, click the **Add New** button.



- Select the appropriate **Service** and click **Apply**  to add it to the list.



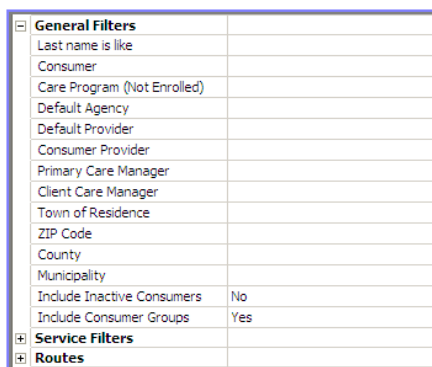
- Repeat steps 7. and 8. to add all desired services to use in the roster.



**Tip:** Add all appropriate services to a Multi-Service roster to allow for entry of many services from a provider to be recorded, or a Service Plan (Multi-Service) roster can be left blank with no services specified to allow for all active planned services to utilize the same roster for a provider.

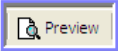
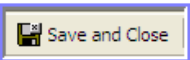
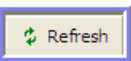
- Click **Close**  to return to the Roster Definition.

- Select the appropriate filtering criteria to narrow the resulting consumer set.





**Note:** Filtering fields can be single-selection dropdowns, multiple-selection lists, or date fields.

12. Click the **Preview**  button in the toolbar to see the resulting set of consumers meeting the filtering criteria set, if desired.
13. Click **Save and Close**  to commit the roster definition to the database and return to the Roster List.
14. Click **Refresh**  on the toolbar if necessary to display the new roster.

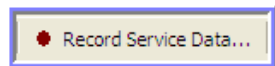
### ***Recording Services in Rosters***

Now that the shell of a roster has been created to define how the services are to be saved, it is possible to use the roster to record service data for the consumers. Below is an overview of a Record Service session in a Roster:

North Texas - SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.-21 - Roster Services																
X Close Roster   Save   Save and Close   Print Roster...   Add Consumers   Find Consumers   Add Service   View Contract   Export																
April   2010   Refresh   Columns   Totals   Suppress Zero Units   Grouping   Service																
Specified Services Roster   NAPIS - All Funding Sources   Area Agency on Aging of North Texas   SENIOR CITIZENS SERVICES OF NORTH TEXAS, INC.   RED DOOR   Congregate Meals   Title III-C1																
Client	Fund Identifier	Total Units	Thu 01	Fri 02	Sat 03	Sun 04	Mon 05	Tue 06	Wed 07	Thu 08	Fri 09	Sat 10	Sun 11	Mon 12	Tue 13	Wed 14
<b>Congregate Meals</b>																
ANDERSON, GWINN (1300008663)	Title III-C1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AYERS, MARTHA (1300008561)	Title III-C1															
BABB, LLOYD (1300008555)	Title III-C1															
BACHELOR, JAMES "LAMAR" (1300008545)	Title III-C1															
BARTLEY, PATRICIA (1300008404)	Title III-C1															
BURGESS, VERNA (1300007755)	Title III-C1															
BURRIS, LUKE (1300007717)	Title III-C1															
CALCOTE, ARLENE (1300007649)	Title III-C1															
CASE, TRACI (1300007511)	Title III-C1															

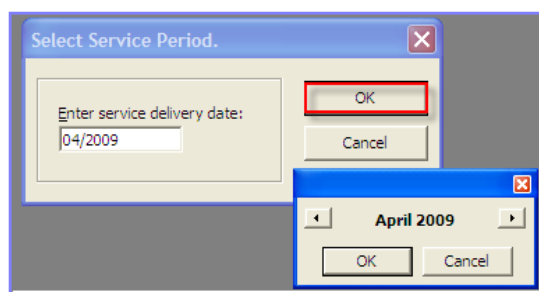
*To record services in a Roster:*

1. Click the **Rosters** button.
2. Select the desired roster in the list and click **Record Service Data**



on the toolbar.

3. Select the **Service Period** for the month of the service and click **OK**.



4. For each consumer row in the list, enter the number of service units in either the **Total Units** column to reflect an aggregate total for the month, *or* in the appropriate column for each individual day that the service was provided to the client.

Client	Fund Identifier	Total Units	Thu 01	Fri 02	Sat 03	Sun 04	Mon 05	Tue 06	Wed 07	Thu 08	Fri 09
<b>Congregate Meals</b>		<b>28.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5.00</b>	<b>6.00</b>	<b>6.00</b>	<b>5.00</b>	<b>6.00</b>
ANDERSON, GWINN (1300008663)	Title III-C1	4.00					1.00	1.00		1.00	1.00
AYERS, MARTHA (1300008561)	Title III-C1	5.00					1.00	1.00	1.00	1.00	1.00
BABB, LLOYD (1300008555)	Title III-C1	3.00						1.00	1.00		1.00
BACHELOR, JAMES "LAMAR" (1300008545)	Title III-C1	5.00					1.00	1.00	1.00	1.00	1.00
BARTLEY, PATRICIA (1300008404)	Title III-C1	4.00					1.00		1.00	1.00	1.00
BURGESS, VERNA (1300007755)	Title III-C1	3.00						1.00	1.00	1.00	
BURRIS, LUKE (1300007717)	Title III-C1	4.00					1.00	1.00	1.00		1.00
CALCOTE, ARLENE (1300007649)	Title III-C1										

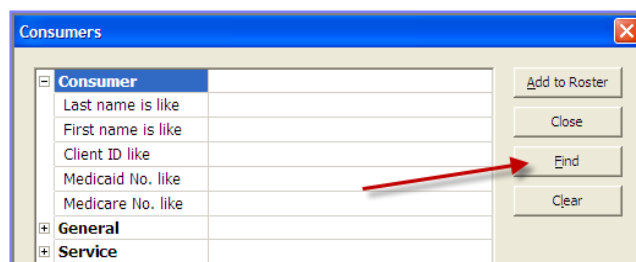


**Tip:** Uncommitted service units added to the roster during the session will appear in **blue**. Complete all data entry before clicking Save to record all units at once.

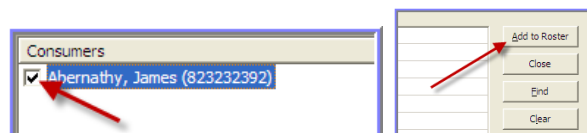
5. Click **Save**  to commit the service deliveries to the database.

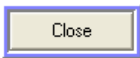
To add a consumer to the Roster (with the roster session already open):

1. Click the **Add Consumers**  button in the toolbar.
2. Enter the appropriate search criteria and click **Find**.



3. Check the box next to the desired consumer(s) in the result set in the bottom window and click **Add to Roster**.

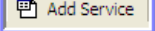


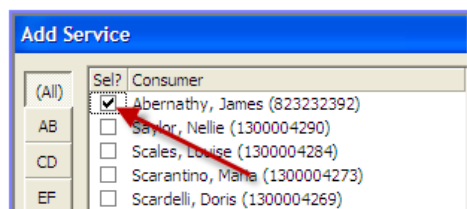
4. Repeat steps 3. and 4. to add additional consumers if desired.
5. Click **Close**  to return to the roster session.



**Note:** Consumers added to the roster in this method will appear in the current roster session only. When opened, a roster session displays only consumers meeting the filtering criteria.

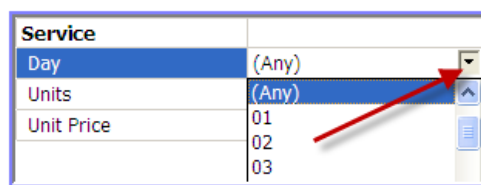
*Alternate method to add services (with the roster session already open):*

1. Click the **Add Service**  button in the toolbar.
2. Check the **Sel?** column next to the names of the consumers to enter services for.



	Sel?	Consumer
(All)	<input checked="" type="checkbox"/>	Abernathy, James (823232392)
AB	<input type="checkbox"/>	Saylor, Nellie (1300004290)
CD	<input type="checkbox"/>	Scales, Louise (1300004284)
EF	<input type="checkbox"/>	Scarantino, Maha (1300004273)
	<input type="checkbox"/>	Scardelli, Doris (1300004269)

3. In the **Service** section, select the **Day** to record the services for, or leave as **(Any)** to record the total for the month.

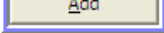
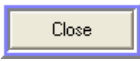


Service	
Day	(Any)
Units	(Any)
Unit Price	01
	02
	03

4. Enter the number of **Units**.



Service	
Day	
Units	
Unit Price	

5. Click **Add**  then click **Yes** to confirm the service addition.
6. Repeat steps 2. through 5. to add additional services if desired.
7. Click **Close**  to return to the roster session.



**Tip:** In multi-service roster types, the **Service** can also be changed to record any services that are offered by the provider.