Training - Job Aid

SAMS/HfA Training

Social Assistance Management System for Aging

AAA & ADRC LTSS Support

SPURS Project

Department of Aging and Disability Services (DADS)

Introduction

This reference manual provides "quick reference" information for State Unit on Aging Programs Uniform Reporting System (SPURS) users in AAA or ADRC organizations and is a supplement to the SAMS User Training for the Long-term Services and Support Level 1 Screening (LTSS).

- When completing LTSS activities, log in to the Mediware Portal using the Mediware User ID assigned. If you are a AAA employee but also responsible for ADRC activities, in order to record ADRC activities that should not be counted as AAA activities you must log in to SAMS using your ADRC Mediware and SAMS user ID and password for the ADRC-related activities.
- Log in to SAMS.
- Complete Information Referral and Assistance activities.
- View Referrals.
- Run reports:
    - LTSS Assessment Report.

It is assumed users of this Job Aid are familiar with the structure of Consumer Records in SPURS, as well as DADS' client intake and service delivery documentation 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.

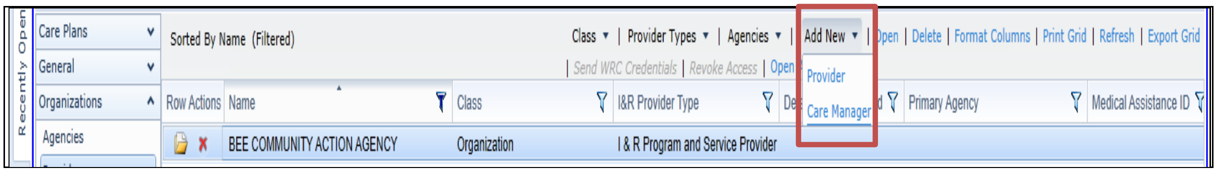
Additional Resources

This training manual only provides a general overview for LTSS referral and assessment data in SAMS. It does not attempt to provide complete system information.

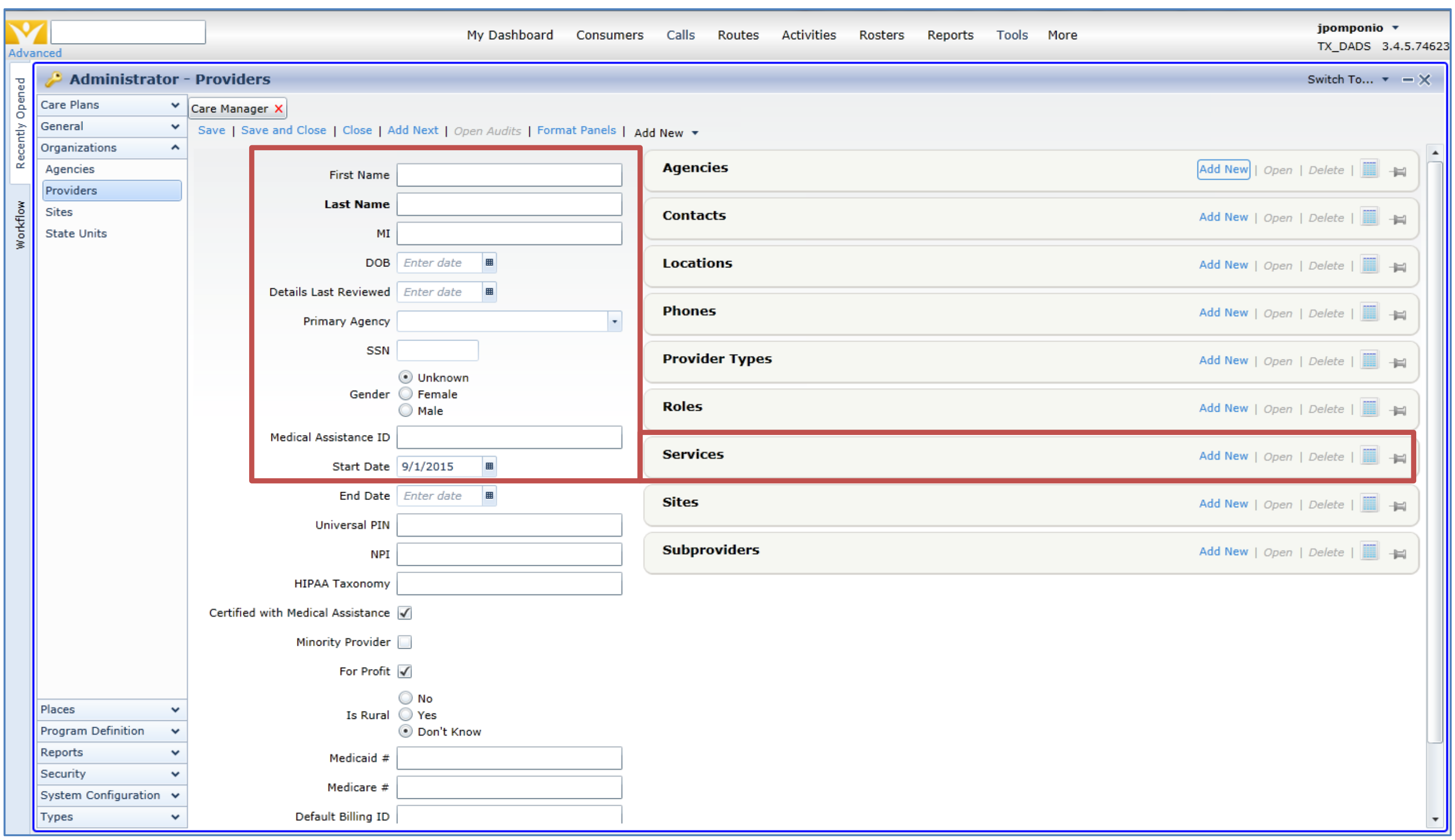
For questions, please contact the DADS Help Desk at AAA.HELP@dads.state.tx.us

To assign referrals to a Care Manager, System Administrators will need to ensure the Care manager is set up in SAMS.

1. Click on **Administrator**
2. Under the **Organizations** tab click on **Provider**
3. Click on **Add New** and select **Care Manager**



4. Populate the highlighted information on the following screen and click **Save and Close** when complete.

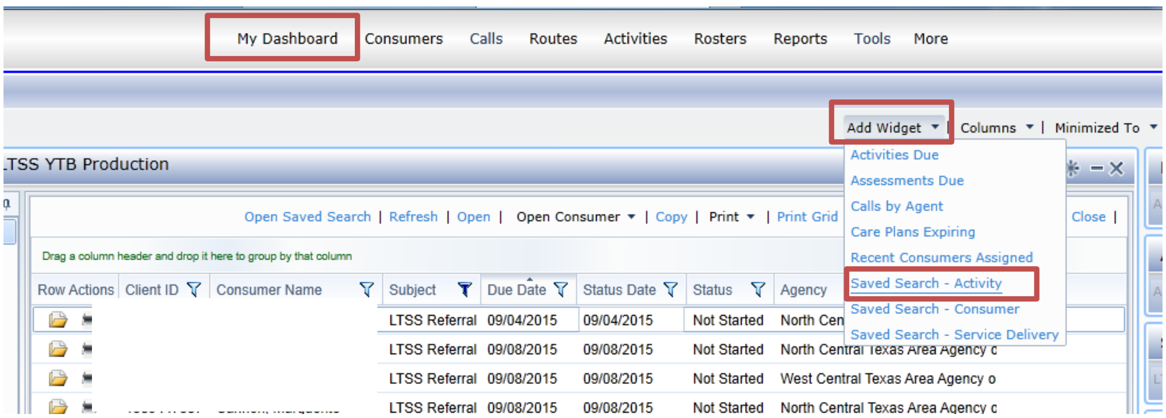


Accessing and Completing Referrals & the LTSS Assessment in SAMS

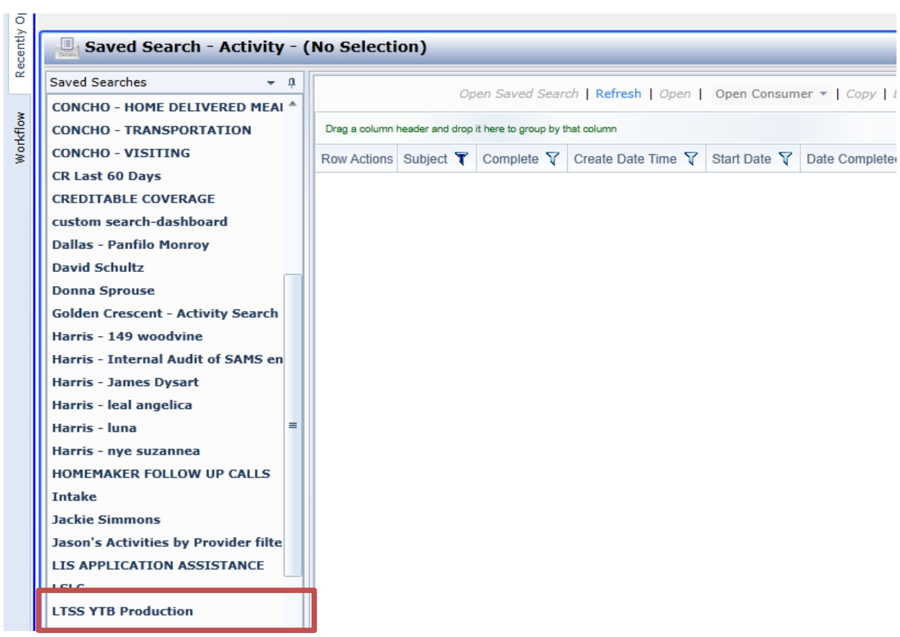
The Long-term Services and Support (LTSS) Level 1 Screening Assessment form housed within SAMS will be automatically populated from the Your Texas Benefits environment and is located in the **Assessments** section of a client Record.

The referral will appear in the Dashboard and can be accessed through the following steps:

- Click on '**My Dashboard**'
- Click on Add Widget. In the Add Widget dropdown select '**Saved Search Activity**'

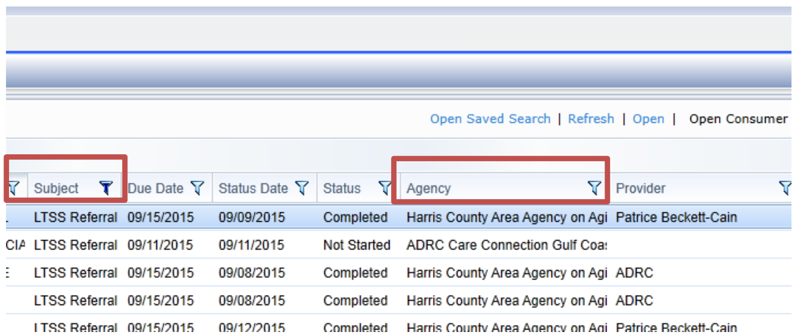


- A navigation pane on the left will appear containing the '**LTSS YTB Production'** Saved Search, click on it and referrals will appear in the dashboard.



The results will yield **all** referrals including but not limited to LTSS referrals that have imported from the YTB environment.

➢ To locate only the referrals for a specific agency, filter the '**Agency**' column to your agency and filter the '**Subject**' column to "**LTSS**"



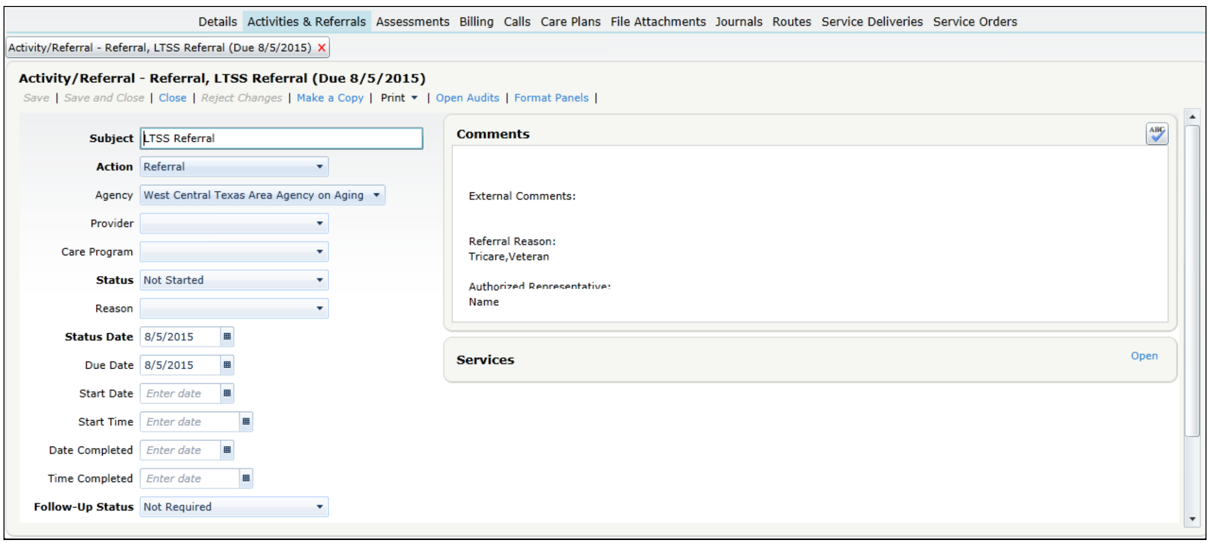
Several key items to note:

- You only need to work referrals for your specific AAA or ADRC agency
- You may see a referral for a different agency and this is due to the Agency that is reflected within the Consumer Record. If the referral you are accessing is shaded in gray when opened, it does not belong to your agency and therefore no action is required.
- Once a referral has been worked and no further action is required, update the '**Status**' to Complete by placing a checkmark in the '**Complete**' column.
- The Dashboard filters and displays results for all clients where the default agency indicated in the Consumer Details section matches the agency value for your log-in account. This can result in LTSS referrals for multiple agencies being displayed.

Viewing Referrals and Assessment Questions on the Consumer Record:

In SAMS, open the Consumer record and click on **Activities and Referrals.** Please note the following **KEY** fields**:**

- Subject
- Action
- Agency
- Status
- Status Date
- Start Date
- Due Date
- Follow-up Status



- ➢ **Subject – LTSS Referral** is the value that will be populated and should not be modified. The subject line is the only method in which to identify the referrals coming from the Your Texas Benefits (YTB) Interface.

- ➢ **Action – Referral** is the value that will be populated.

- ➢ **Agency** - the YTB interface will populate the AAA or ADRC values based on the zip code entered within the YTB portal and identify the initial owner of the referral.

- **Provider** - the provider field is not populated by the YTB interface therefore the Agency / ADRC personnel must populate this field if necessary. This is not a required field.

- **Status field** – **Not Started** is the default value that will be populated by the YTB interface, and the AAA / ADRC personnel will be responsible for updating this value. The frequency and duration the referral should remain open (versus closed / completed) is not yet determined.

- **Caution**- if the referral status is modified within SAMS it will NOT be updated in the YTB environment. All the changes to the referral stay local to the SPURS environment.

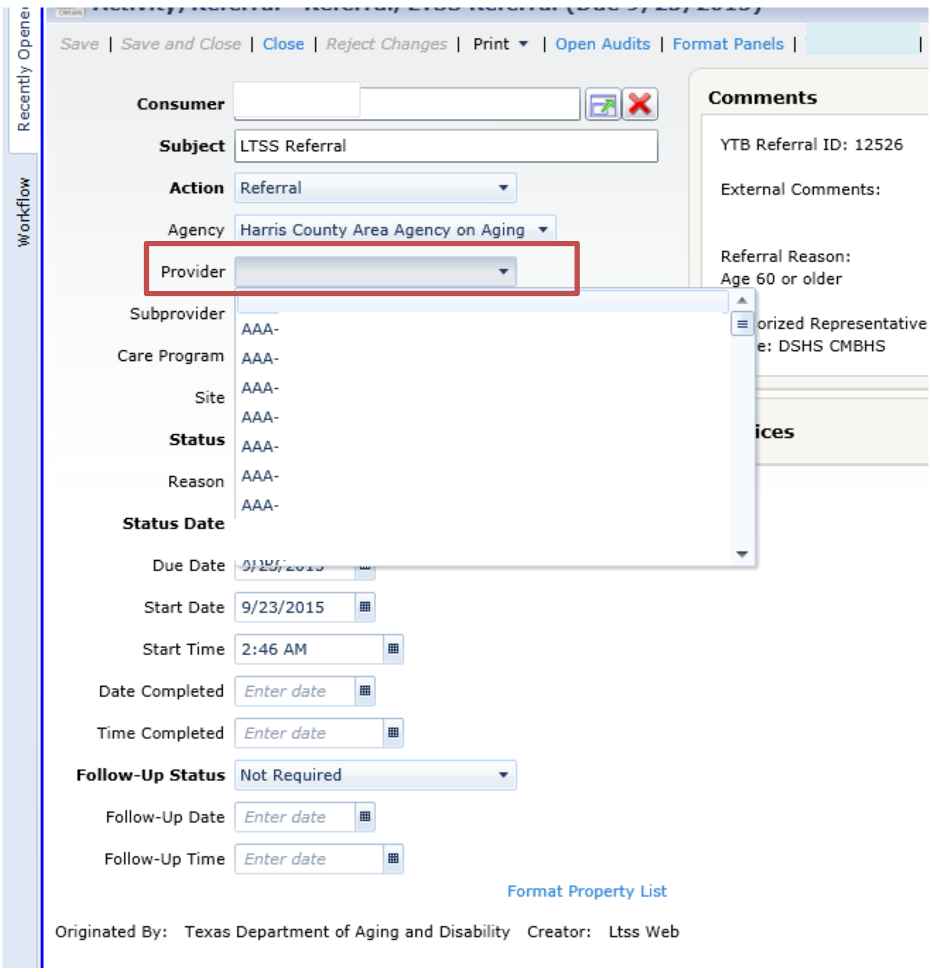
- **Status Date and Due Date** – the YTB interface will populate both values with the create date in the YTB environment, and the AAA / ADRC personnel will be responsible for updating this value if necessary.

- **Start date**- this field will populate by the YTB interface with the create date in the YTB environment, similar to the Status and Due Date fields.

- **Follow-up Status** – **Not Required** is the default value that will be populated by the YTB interface. The AAA / ADRC personnel have the ability to change this value if necessary and this field is optional.

Assigning Referrals to a Care Manager within your Agency

- Open the Referral
- Under the Provider drop down menu select the appropriate Care Manager
- Click Save and Close



ADRC Users Assigning Referrals to an external Agency

- Open the Referral
- Under the Agency drop down menu select the appropriate Agency you wish to send the referral to. (Once the referral is sent to an external agency, that referral will appear in the external agency's dashboard and that agency will assign a Provider or Care Manager responsible for working the referral.)
- Click Save and Close

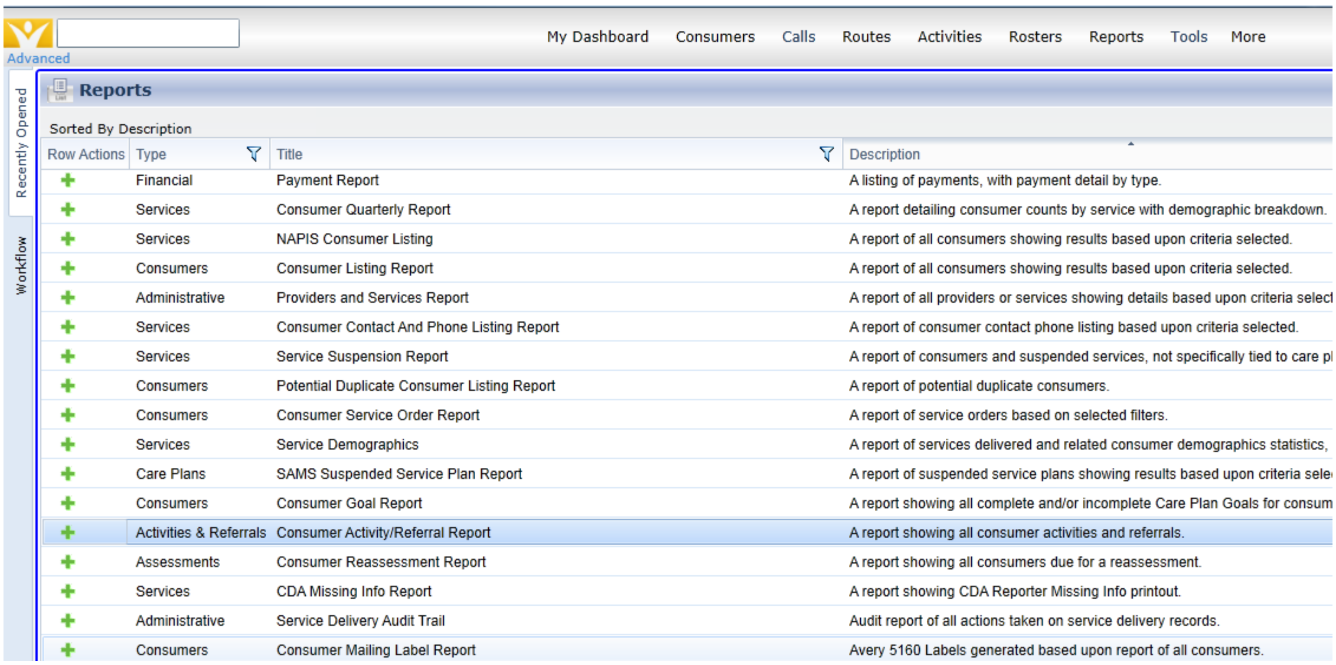
Several Important Notes regarding AAA and ADRC User Functionality:

- ADRC Users can modify caller records only where the default consumer agency listed is their ADRC.
- If an existing consumer has been referred to an ADRC, service deliveries from other agencies will be visible however cannot be modified.
- Referrals can be sent by an ADRC to any agency that is actively receiving referrals within the SAMS environment.
- Users with dual AAA and ADRC log-in credentials to SAMS will need to log-in under the agency in which they wish to complete the activity. This is to separate the ADRC and AAA activities for data entry and reporting purposes.

Reports

There are several report options available to review the LTSS referrals. The first is the Consumer Activity Referral Report found in the Reports menu within SAMS.

Consumer Activity Referral Report



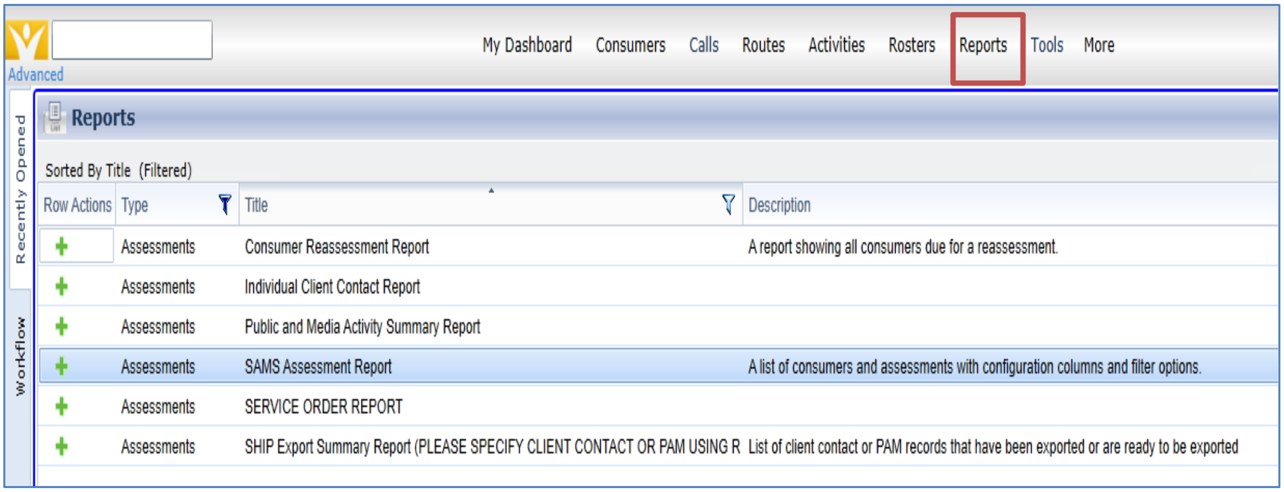
Row Actions	Type	Title	Description
+	Financial	Payment Report	A listing of payments, with payment detail by type.
+	Services	Consumer Quarterly Report	A report detailing consumer counts by service with demographic breakdown.
+	Services	NAPIS Consumer Listing	A report of all consumers showing results based upon criteria selected.
+	Consumers	Consumer Listing Report	A report of all consumers showing results based upon criteria selected.
+	Administrative	Providers and Services Report	A report of all providers or services showing details based upon criteria select
+	Services	Consumer Contact And Phone Listing Report	A report of consumer contact phone listing based upon criteria selected.
+	Services	Service Suspension Report	A report of consumers and suspended services, not specifically tied to care pl
+	Consumers	Potential Duplicate Consumer Listing Report	A report of potential duplicate consumers.
+	Consumers	Consumer Service Order Report	A report of service orders based on selected filters.
+	Services	Service Demographics	A report of services delivered and related consumer demographics statistics,
+	Care Plans	SAMS Suspended Service Plan Report	A report of suspended service plans showing results based upon criteria sele
+	Consumers	Consumer Goal Report	A report showing all complete and/or incomplete Care Plan Goals for consum
+	Activities & Referrals	Consumer Activity/Referral Report	A report showing all consumer activities and referrals.
+	Assessments	Consumer Reassessment Report	A report showing all consumers due for a reassessment.
+	Services	CDA Missing Info Report	A report showing CDA Reporter Missing Info printout.
+	Administrative	Service Delivery Audit Trail	Audit report of all actions taken on service delivery records.
+	Consumers	Consumer Mailing Label Report	Avery 5160 Labels generated based upon report of all consumers.

Report Filter Settings:

- Activity/ Referral: Select Referral Under the Action folder
  Select the Agency
- Care Managers: Select the Care Manager(s) from the list

LTSS Assessment Activity Report

Start with the SAMS Assessment Report by clicking on **Reports**. Set Parameters below as indicated. Parameters may be adjusted to meet individual agency needs.

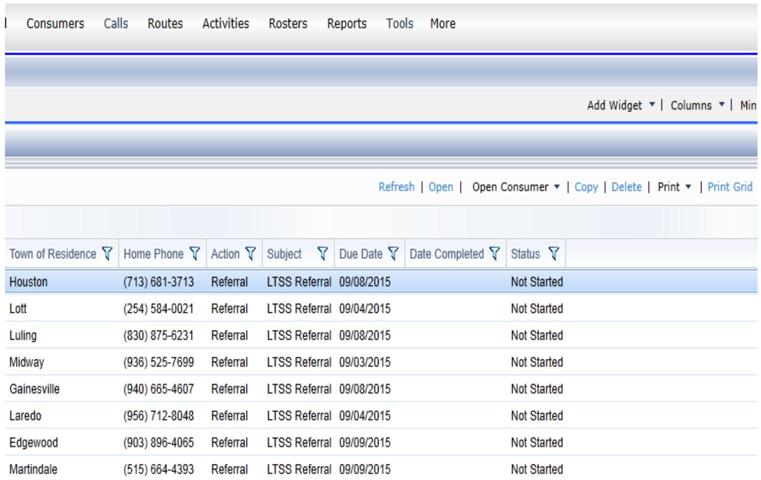


Report Filter Settings:

- Sort by: Assessment Form
- First Group by: Assessment Form
- Include Consumers without Assessments: No
- Service Delivery Service: Assessments
- Form Name Contains: LTSS
- Care Manager: Select Care Manager from List

Viewing Assessment Questions (Screenings) from the Dashboard Referral

- Access the referral in the SAMS Dashboard

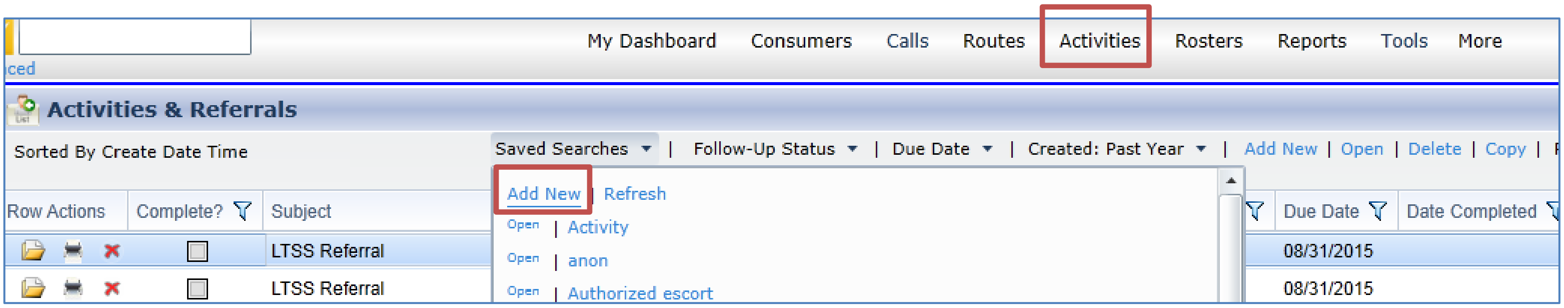


- Highlight the Consumer Referral and double click to Open

- Click on the Consumer Name and then click Assessments. The assessments for the consumer will appear. Click on the LTSS Screening or Open to view the assessment questions and answers.

To Create a Saved Search

1. Click Activities
2. Click Saved Searches and select Add New from the Dropdown Menu.



3. Populate search parameters. When complete, click save and close.
4. Click on "Dashboard" to access the saved search.
5. Click on "Add Widget", then "Saved Search Activity" and the saved search will appear in the Saved Searches tool pane on the left.