Overview

This document is published to support the new functionalities of the User Dashboard, Saved Searches, Departments, and the revised Consumer Summary screen released to production with SAMS 2.0.

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User Dashboard

SAMS 2.0 will feature dashboards to present key information to users. A dashboard is defined as a custom view comprised of multiple widgets (or visual objects that provide easy access to frequently used functions).

The following widgets have been created in SAMS to help Case Managers keep track their consumers and upcoming tasks:

- Assessments Due
- Activities Due
- Care Plans Expiring
- Recent Consumers Assigned
- Search Consumers
- Up to 5 Saved Search Widgets (Saved Custom Searches)

Users will have the ability to customize their dashboard to show all, some, or none of the above widgets, repositioning the widgets on the dashboard according to their own preferences and needs.


Customizing your Display

Each user can customize their Dashboard display using the My Dashboard widget. The My Dashboard widget allows them to:

- Choose how many columns you would like to display on your dashboard.
- Choose the font type and size of the words within the widgets of the dashboard.
- Choose background color.
- Choose font color.
- Choose the inactive background color.

- Choose the inactive font color.
- Select which widgets you would like to display on your dashboard.
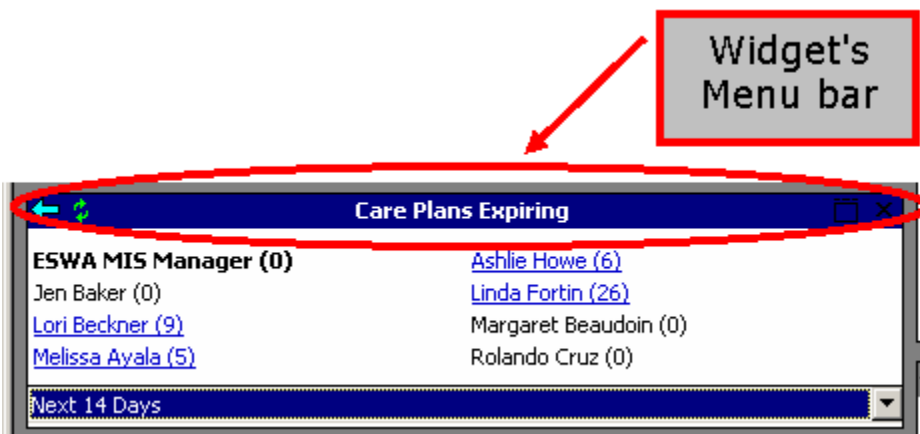- Move widgets around.
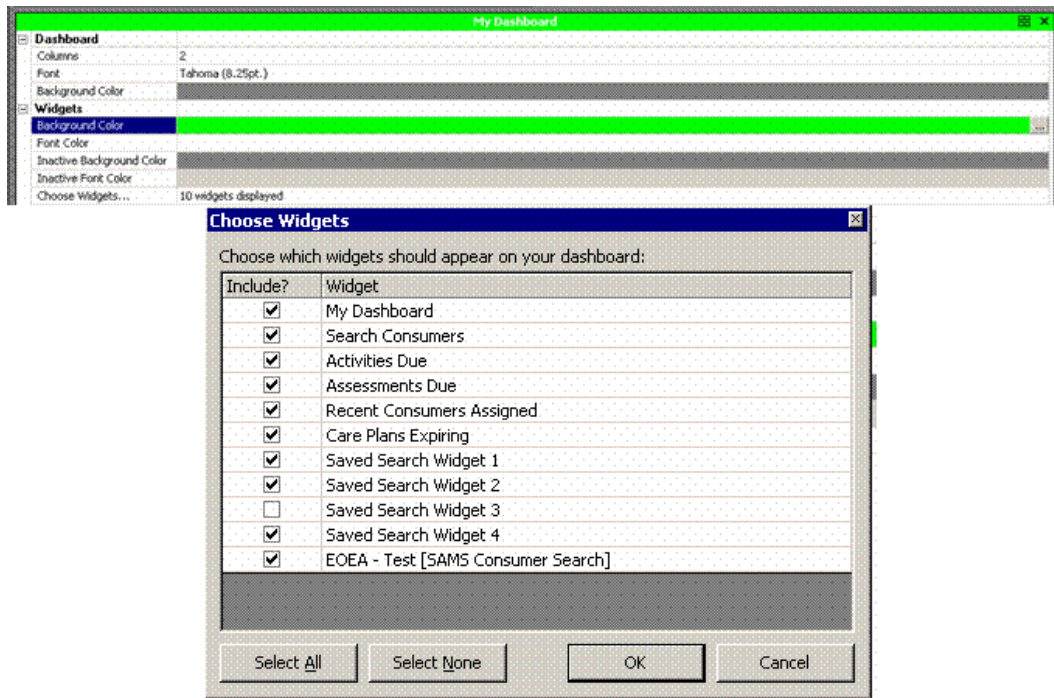
Additionally, users can move their widgets around. Here's how:

Roll the mouse over the widget's menu bar. The Cursor changes its look from a single arrow to a four-pointed arrow.
Mouse-down on the widget's menu bar.
Holding down your mouse, drag the widget to a new location.
Release the mouse.

User Setting to Display Dashboard on login

The first time a user opens SAMS after SAMS 2.0 is released, s/he will be asked whether they want the dashboard to automatically display at each login of SAMS. The prompt comes up the first time a user clicks the Dashboard button (not immediately at login):
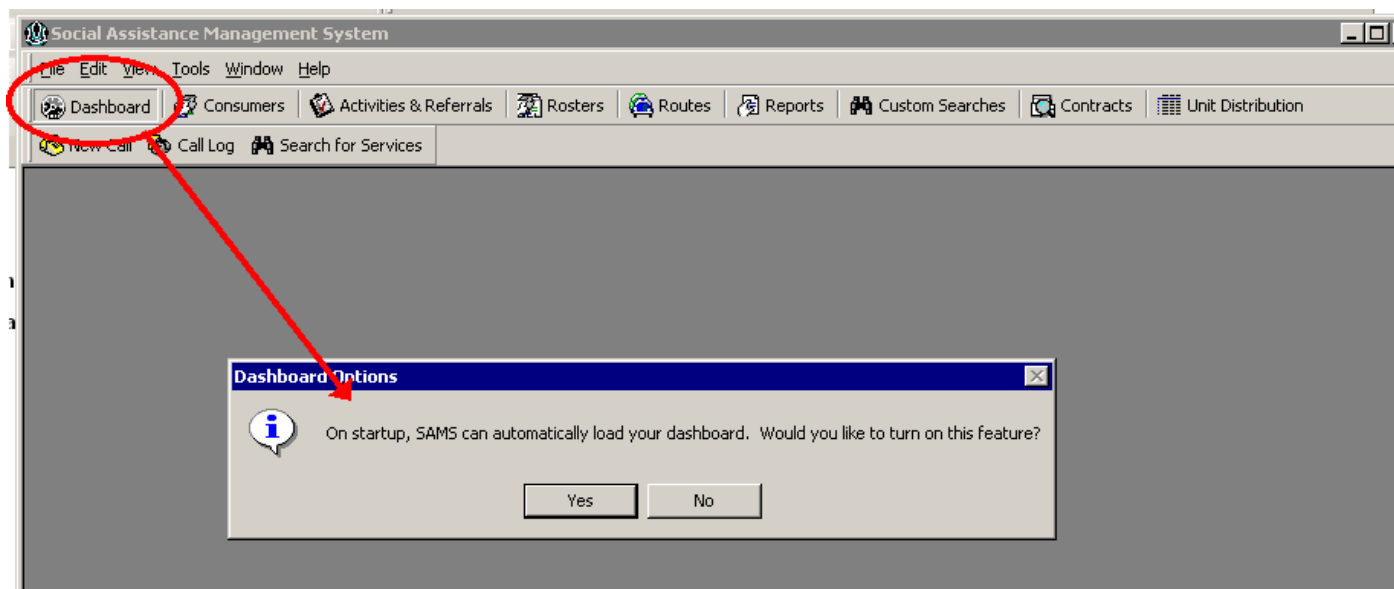
After selecting [Yes] or [No] the user receives another prompt informing them where they can find this setting, if should they change their mind.
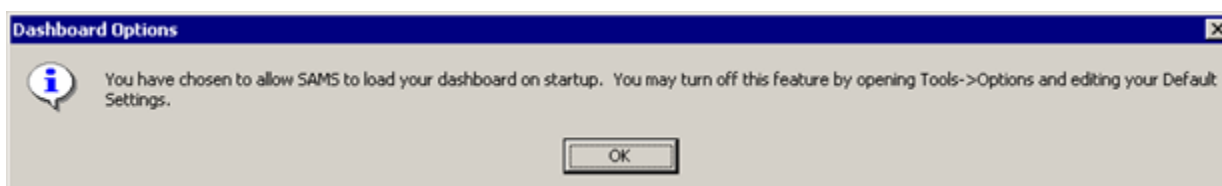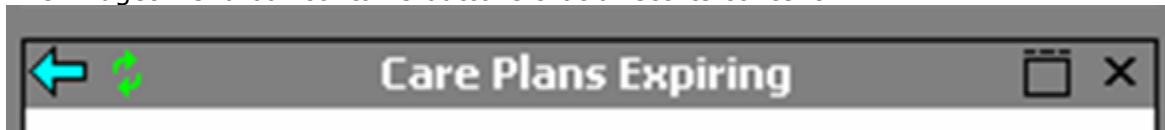

The dashboard auto-display upon login can be turned on or off using the Tools >Options menu.
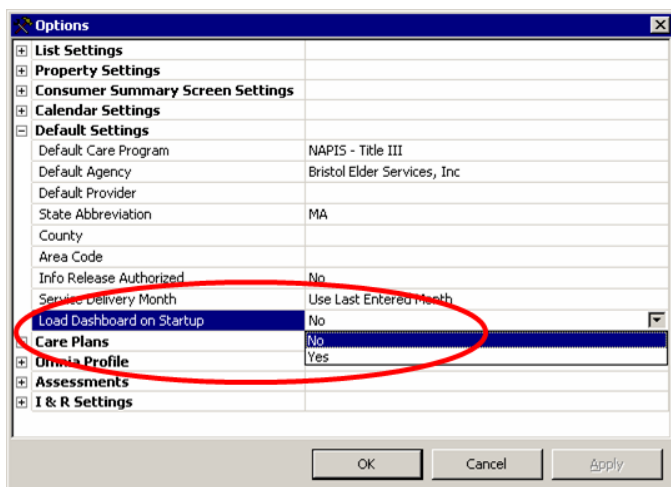
These prompts are only displayed the very first time a user click the "Dashboard" button (or the first time after doing a 'reset user interface').

Widget Buttons (functionality)

The Widget Menu bar contains buttons that affect its content.


Users are able to:

- **Go back** by clicking button.

- **Refresh** the information contained in each widget by clicking button.

- **Return to dashboard view** by clicking button.

- **Maximize** the widget by clicking button.

- **Close** the widget by clicking button.
- **Choose a timeframe**, using the dropdown menu, to display the desired information (selected widgets only).
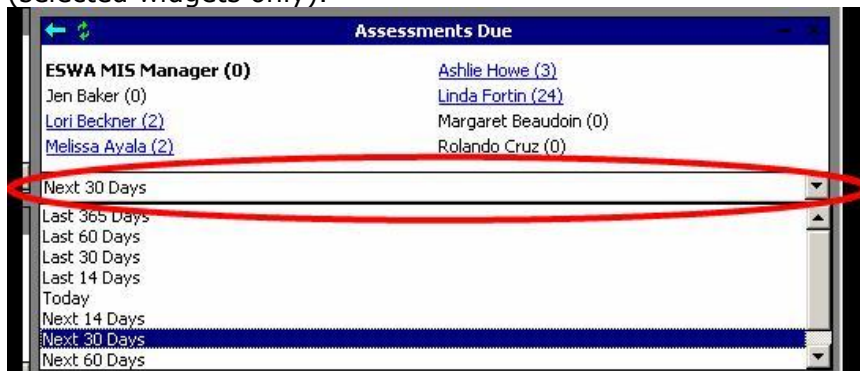
Displaying Custom Searches on Your Dashboard

Users will be able to display up to five (5) saved Custom Searches.

To display the results of a saved search, users select their saved search from the dropdown menu.
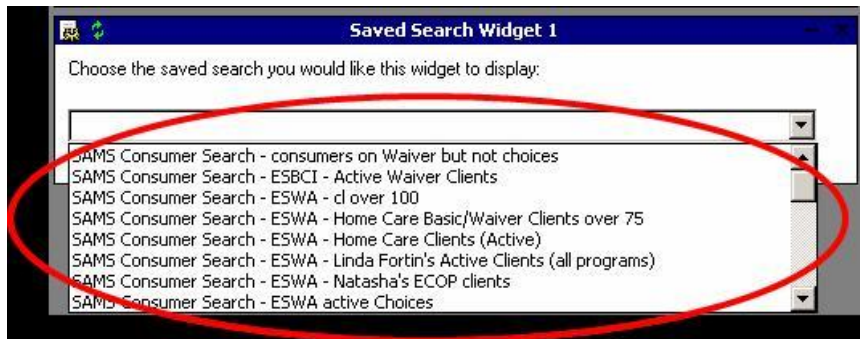
Once a saved search is selected, the results display on the user's dashboard.

Client Id	Gender	Date of Birth	Full Name	First Name
1300000052	F	02/26/1939	Zzindian, Oberline	Oberline
1300000082	F	04/02/1914	ZZCamp, Edith	Edith
1300000123	F	09/30/1918	Zz Chinese, Arthur	Arthur
1300000159	F	03/05/1925	Zygadlo, Miriam	Miriam
1300000166	M	10/17/1940	Zybas, Robert	Robert
1300000195	M	09/02/1942	Zverev, Anna	Anna
1300000320	F	11/05/1919	Zuba, Tyler	Tyler
1300000374	F	06/18/1915	Zona, Jean	Jean
1300000390	M	11/29/1936	Zoltko, Faina	Faina

Users can access a consumer's record by double clicking their name on the list. **A significant convenience** of the dashboard approach is that the user will see the information related to the widget: if the consumer is listed in the Care Plans Expiring widget, when the user double-clicks, the consumer's Care Management screen is displayed, listing all Care Plans.

Changing Saved Searches in a Widget

The saved search widgets 1-5 do not contain a back button, instead they contain a change saved search icon ![icon], which bring you back to the saved search selection screen. Use the drop-down to select which saved search you would like to display on your dashboard.

Departments in Widgets

The Department feature in SAMS 2.0 will allow MIS Managers and Program Managers to define a group of users as a department. A department in SAMS is comprised of agency users who are identified as either a supervisor or members.

- **Supervisors**: Users tagged as a supervisor of a department will be able to view their own and their department members' Recent Consumers Assigned, Assessments Due, Activities Due, and Care Plans Expiring in the dashboard section of SAMS. If the user is a supervisor of more than one department, they see data related to all members of all departments.

- **Members**: See Recent Consumers Assigned, Assessments Due, Activities Due, and Care Plans Expiring, from among their own consumers (where the member is tagged as Primary Care Manager)

Refreshing your Dashboard to show updated information

By clicking the **Refresh** button in the Dashboard toolbar, users will have the ability to refresh the entire dashboard, including all widgets, to show the most updated information.
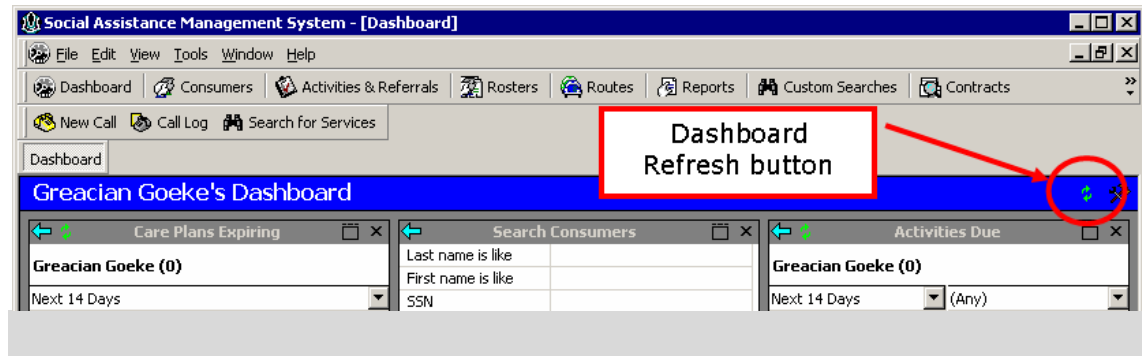
Consumer Summary Screen (Updated)

New Information

The Consumer Summary screen has been updated to display additional consumer information in a more intuitive fashion. Users will be able to get a better snapshot of the different aspects of the consumer from the new screen and be able to interact with different parts of the record via the Add/New and Edit buttons without needing to go to the individual areas. In addition, through **Tools / User Options** users can adjust the font, font size, number of columns, header and sub-header colors.

Screenshot: New Consumer Summary Screen

Assessment Information

This data element contains hyperlink buttons to view the consumer's list of Assessments, or to [Add New] (adding a new assessment), or to edit/view a recent assessment.

The current **Assessment section** of the consumer summary screen has been enhanced to display

- Medications
- Functional Impairment Level from the Social module
- Critical Unmet Needs (true/false)
- Non-Critical Unmet Needs (true/false)

Last Assessments		(Add New)
07/23/2008 (Next: 01/23/2009) Comprehensive Data Set - Home Care		(Edit)
fergusonex Dosage: 12 Number: 12		by mouth (PO)/(Q2H) every two hours
ferrirsol Dosage: 23 Number: 23		enteral tube/(Q2H) every two hours
Functional Impairment Level (FIL)		1
FIL - Critical Unmet Needs		True
FIL - Non-Critical Unmet Needs		False

NOTE: since the assessments assumed to contain Protected Health Information (PHI), information displayed here will come from the **most** recent assessment that **is visible to the user** in accordance with organizational security. If the user cannot see a assessment for the client due to its Assessment Agency and Assessment Provider elements, no information will be displayed here, even if an assessment from another agency exists.

Customizing your display
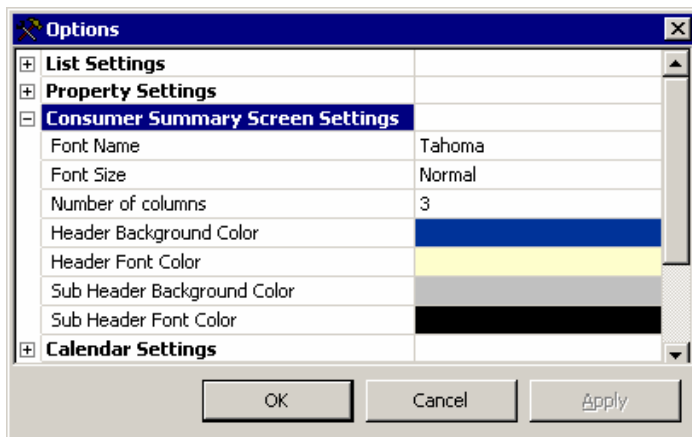
Using Tools>Options menu, users have the ability to customize their consumer summary screens to their liking. In the Options menu, users can adjust the font, font size, number of columns, and header and sub-header colors.

Custom Searches

SAMS 2.0 will have a new button on the tool bar for "Custom Search". This feature allows individual users the ability to create custom consumer views by specifying filter definitions within SAMS without have to go to the SAMS Reporting section. These custom consumer views can be shared with other SAMS users. These searches or views can be saved to be used repeatedly. The saved search/views can be accessed by going to the "Customer Search" section or from the consumer list page by selecting it from the consumer type filter.

To create a custom search, click on the Custom Searches button.

Note: Not all users will have the need to create custom searches. Managers and Administrators can create Custom Searches for their staff.
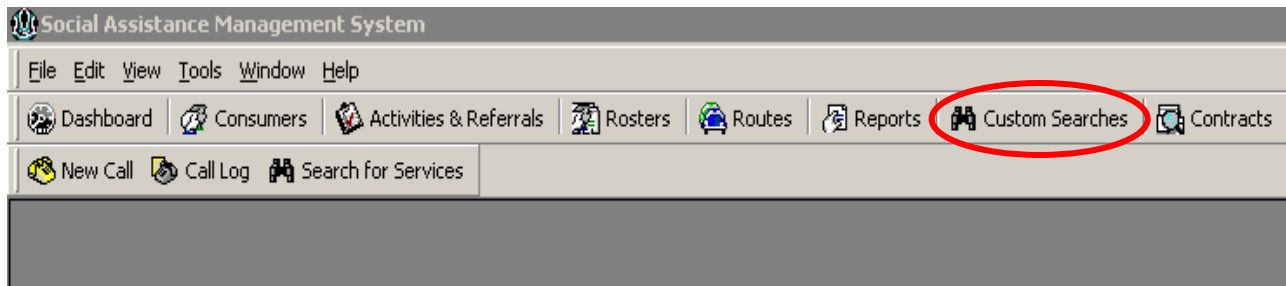
Custom Search Settings are the same as the settings for similar SAMS Reports, such as the Consumer Listing report. At present, there is only one Custom Search Title on the top half of the screen and the Custom Search Definitions to which you have access will be listed on the bottom half of the screen.
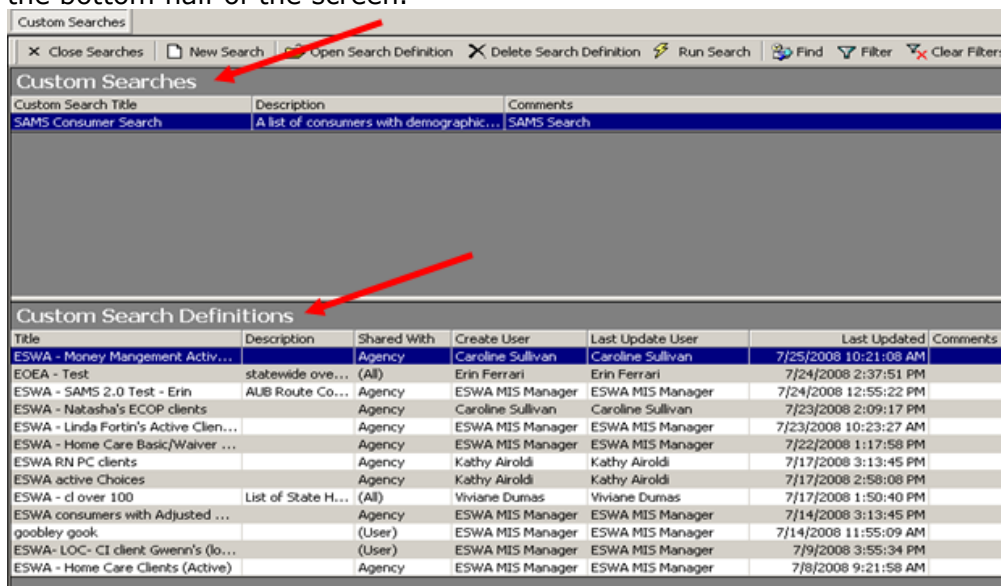
Setting Search Parameters/Filters

Setting Parameters, saving and previewing Custom Search is similar to setting SAMS report criteria. When naming saved searches, you should use your agency acronym as part of the naming convention populating the Search Title field, just as you do with SAMS Report Definitions.

Sharing

Access to Custom Searches/Views is limited to the user's organizational security settings. However, there is a new "Share with" functionality that allows users to share views. Users can Share with All, None, Agency, Provider, State and the level of modifications allowed can also be set.

For new Saved Searches, the default will be to share with the creating user's Agency with all modifications allowed.

Creating Searches for your use only

Custom Searches	ESWA - Custom Search / View for creator - SAMS Consumer Search

| × Close Search | 🖫 Save Search | 🖫 Save and Close Search | Save Search As ... | 🏹 Clear All Filters | 🔍 Preview Search |

ESWA - Custom Search / View for creator - SAMS Consumer Search

Search Title	ESWA - Custom Search / View for creator
Description	
Subtitle	
Shared With	(User)
Modifications Allowed	(None)

Preview Your Search

Custom Searches	ESWA - SAMS 2.0 Test - Erin - SAMS Consumer Search

| × Close Search | 🖫 Save Search | 🖫 Save and Close Search | Save Search As ... | 🏹 Clear All Filters | 🔍 Preview Search | 🎇 Refresh Search |

ESWA - SAMS 2.0 Test - Erin - SAMS Consumer Search

Search Title	ESWA - SAMS 2.0 Test - Erin
Description	AUB Route Consumers in Waiver Pro...
Subtitle	
Shared With	Agency
Organization	Elder Services of Worcester Area, Inc.
Modifications Allowed	(All)
⊟ **(Search Results)**	
Choose Columns for Consumer	(8 Items)
⊟ **Care Enrollment**	
Care Program	(3 Items)
Enrollment Status	(Any)
Status Reason	(Any)
Date Filter Type	(None)
Date Filter Range	All
⊟ **Care Managers**	
Care Manager	(Any)
Apply Today Filter? (Effective As of Today)	No
Primary Care Manager Designation	(Any)
Date Filter Type	(None)
Date Filter Range	All
⊟ **Consumer Details**	
Consumer Type	(Any)
Active	(Any)
Reason	(Any)
Default Agency	Elder Services of Worcester Area, Inc.
Date Filter Type	(None)
Date Filter Range	All
Route Consumer	(8 Items)
⊞ **Providers**	
⊞ **Advanced Filters**	

| Client Id	Gender	Full Name	First Name	Address 1
1300240391	F	,, Zzzzzzzzzzzzz	Zzzzzzzzzzzzz	0 Zzzzzzzzzz Road
1300240315	F	Abato, Sylvia	Sylvia	76 ZZCohen Road
1300240054	M	Abrahms, Oai	Oai	337 Zou Road
1300238134	F	Alexander, Hazel	Hazel	2257 Young Road
1300237049	F	Alphonse, Marion	Marion	3342 Wylie Road
1300236547	F	Amarie, Maria	Maria	3844 Wowk Road
1300236513	M	Amato, Mildred	Mildred	3878 Worthington Road
1300236391	F	Amenta, David	David	4000 Woolf Road
1300236371	M	Amero, Marie	Marie	4020 Woodworth Road
1300235218	F	Andrews, Sharen	Sharen	5173 Witcher Road
1300233064	M	Askins, Michael	Michael	7327 Wikstedt Road
1300232572	F	Augenti, Dorothy	Dorothy	7819 Whitley Road
1300232489	F	Augusto, Henrietta	Henrietta	7902 Whitehouse Road
1300232369	M	Austin, Richard	Richard	8022 White Road
1300232244	F	Avery, Lois	Lois	8147 White Road
1300231881	F	B, Roy	Roy	8510 Whitaker Road
1300231480	F	Baer, John	John	8911 Wetmore Road
1300230750	F	Balan, James	James	9641 Welch Road
1300230543	F	Ball, Michael	Michael	9848 Weiner Road
1300230086	M	Baptiste, Mary	Mary	0305 Weaver Road
1300230001	M	Barbale, David	David	0390 Wayne Road
1300229229	F	Baron, Louise	Louise	1162 Wareham Road
1300227796	F	Bauer, Wayne	Wayne	2595 Waldron Road
1300226439	F	Belanger, Pauline	Pauline	3952 Villani Road
1300226032	F	Bellardino, Irene	Irene	4359 Vickery Road
1300225302	F	Bennett, Antone	Antone	5089 Veiga Road
1300224993	F	Bento, Doris	Doris	5398 Vaughn Road
1300224753	F	Berger, Mr	Mr	5638 Varsamis Road
1300224433	M	Berman, Marcel	Marcel	5958 Vandal Road
1300223808	F	Bertone, Mary	Mary	6583 Vail Road
1300223532	F	Bethoney, John	John	6859 Urann Road

NOTE: The previewed list is not functional - if you double-click a consumer name it will NOT open the consumer record. The purpose of the preview is to enable the user to verify the parameters, but not to enable full use of the results list. The full functionality of the custom search results list is available on dashboard widgets and from the consumer list.

Custom Searches are accessible through Consumer List

Customer searches that have been saved can be accessed via the SAMS Consumer list screen.
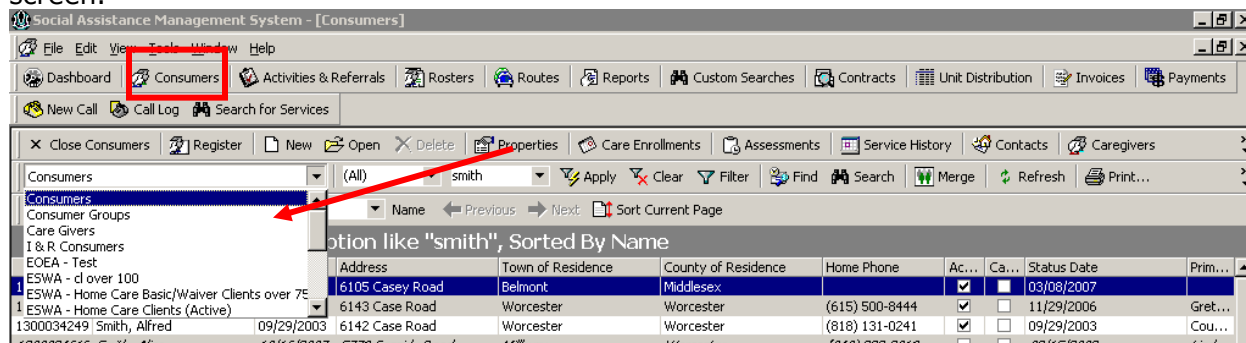
Please notice that once you open a customer search/view, you have the ability to Edit, Delete, print list, export results, find and refresh from the results page. It is important to delete custom searches if you are not going to use them as this list of searches could potential become long.
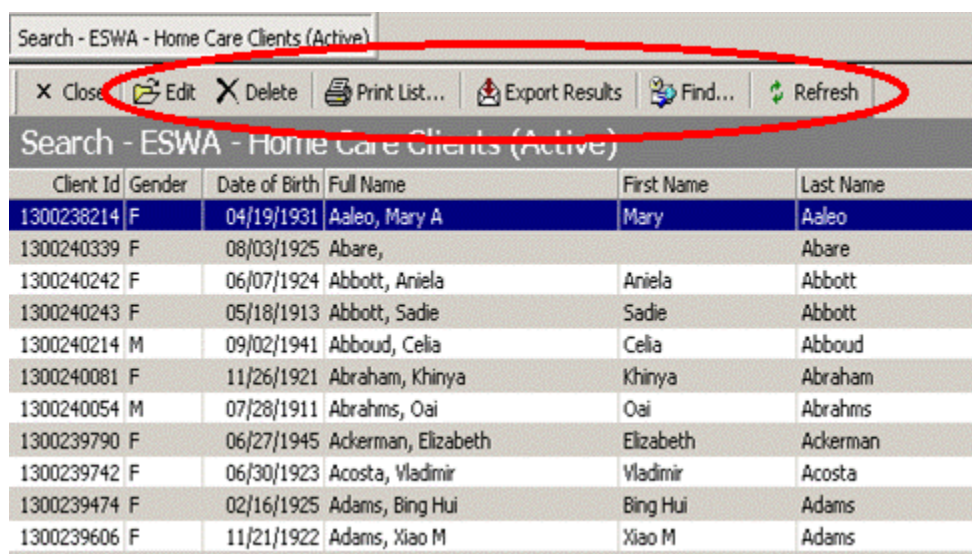
NOTE: The results of any custom search/view may not exceed the consumer list limit of 10,000 row. If more than 10,000 rows would be returned, only the first 10,000 will be displayed. **Paging is not supported with this feature**.

Configuring Departments

The full benefit of most of the Dashboard widgets will be gained by configuring Departments, comprised of Case Managers and other Agency staff who are assigned to consumer records in the Care Manager section of the consumer record, or who are assigned to Activity/Referrals as Activity Providers.

User Roles with Access

The Department feature in SAMS 2.0 allows users with the appropriate access to define a group of users as a department and can identify users as either members or supervisors. Users appointed as a supervisor will be able to view their own and their member's Recent Consumers Assigned, Assessments Due, Activities Due, and Care Plans Expiring in the dashboard section of SAMS.

How to set up a new Department

To create a Department, users will click on **Tools** > **Departments**

Screenshot of a Department

Some Notes on this department listing:

- A department can have more than one supervisor. Each supervisor will see a view of department activities through their own dashboard widgets.
- The selected Members only checkbox provides a convenient view of the department.
- Contact SAMS Administrator if there is a mismatch between the User ID and Care Manager columns. If these two elements are disconnected (for any user) then the Widget Information may be incorrect.