

# Training - Job Aid



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

(703) 674-5100

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

## SAMS Training Social Assistance Management System

### SHIP Program



### SPURS Project

## Department of Aging and Disability Services (DADS)

Version 2.0 FINAL

May 7, 2010

**Version Control: Job Aid – Ship Program**

Version	Release Date	Changes and Comments
2.0	5/7/2010	Initial Release in FINAL Format



Copyright © 1997-2010 Harmony Information Systems, Inc.

All rights reserved.

The software contains proprietary information of Harmony Information Systems, Inc.; it is provided under a license agreement containing restrictions on use and disclosure and is also protected by copyright law. Reverse engineering of the software is prohibited.

Due to continued product development this information may change without notice. The information and intellectual property contained herein is confidential between Harmony Information Systems, Inc. and the consumer and remains the exclusive property of Harmony Information Systems, Inc. If you find any problems in the documentation, please report them to us in writing. Harmony Information Systems, Inc. does not warrant that this document is error-free.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission of Harmony Information Systems, Inc.

Microsoft Word, Microsoft Office, Windows®, and Window 2000/NT/XP™ are trademarks of the Microsoft Corporation.

## Table of Contents

<b>INTRODUCTION</b> .....	<b>1</b>
Scope of Job Aid.....	1
Illustrations and Graphics.....	2
Additional Resources.....	2
<b>ICC FORM</b> .....	<b>2</b>
Entering Data into the ICC Form.....	3
<b>PAM FORM</b> .....	<b>7</b>
Entering Data into the PAM Form.....	7
<b>PRINTING COMPLETED FORMS</b> .....	<b>9</b>

## 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.

## Introduction

As of April 2010, the SAMS system has new features to support State Health Insurance Program (SHIP) activity. Benefits Counselors will now be able to use SAMS to document their work for individual client contacts (ICC) and public and media (PAM) events. The ICC and PAM forms in SAMS are only a first step.

Later in 2010, additional functionality is planned. For now, SAMS has the capability to capture ICC and PAM activities, and to deliver basic reports on these records. In addition, SAMS will enable certain services to count for NAPIS reporting as well as for reporting to CMS.

The new ICC and PAM forms in SAMS go into effect on July 1, 2010. Your Area Agency on Aging (AAA) may elect to use the new forms earlier or later than July 1, depending on the AAA's schedule for SAMS Go Live.

## *Scope of Job Aid*

This Job Aid document represents a supplement to the SAMS User Training for the entry of SHIP data.

In this Job Aid, you will learn how to enter data into the ICC and PAM forms. Steps will include:

- How to access the SHIP forms.
- Navigating and entering information into the forms.
- Managing required questions.
- Service Delivery verification.
- Printing the forms.

Users of this Job Aid should be familiar with the structure of Consumer Records in SAMS. Experience with or instruction in the use of SAMS Assessments is beneficial as well.

### ***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 SHIP 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.

## **ICC Form**

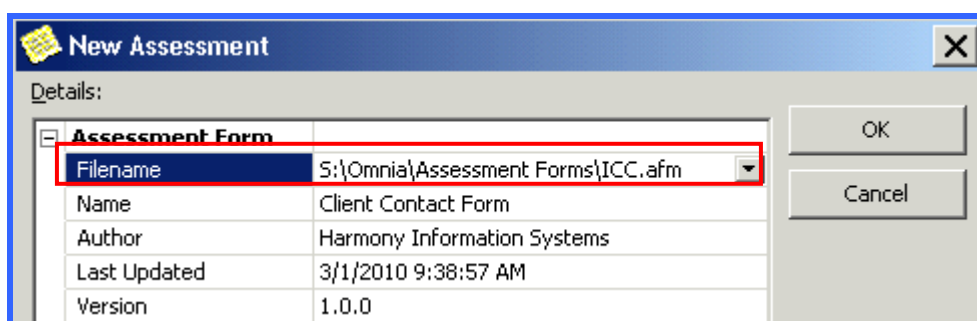
In SAMS, an Assessment is a data collection instrument that enables capture of information in a question-response format. The ICC, or Individual Client Contact form, is located in the **Assessments** section of a Consumer Record.



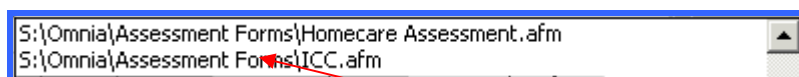
**Note:** For this Job Aid, we will assume that a Consumer Record has been created. Refer to the SAMS Training Manual for further information on creating Consumers.

## Entering Data into the ICC Form

1. In a Consumer Record, click the **Assessments** icon, located in the *Navigation Pane*.
2. In the Assessments Toolbar, click **New Assessment**.
3. In the New Assessment window, the ICC form may already appear in the Filename field.



4. If the ICC doesn't appear in the Filename field when the New Assessment window is opened, click the dropdown arrow and select the form.

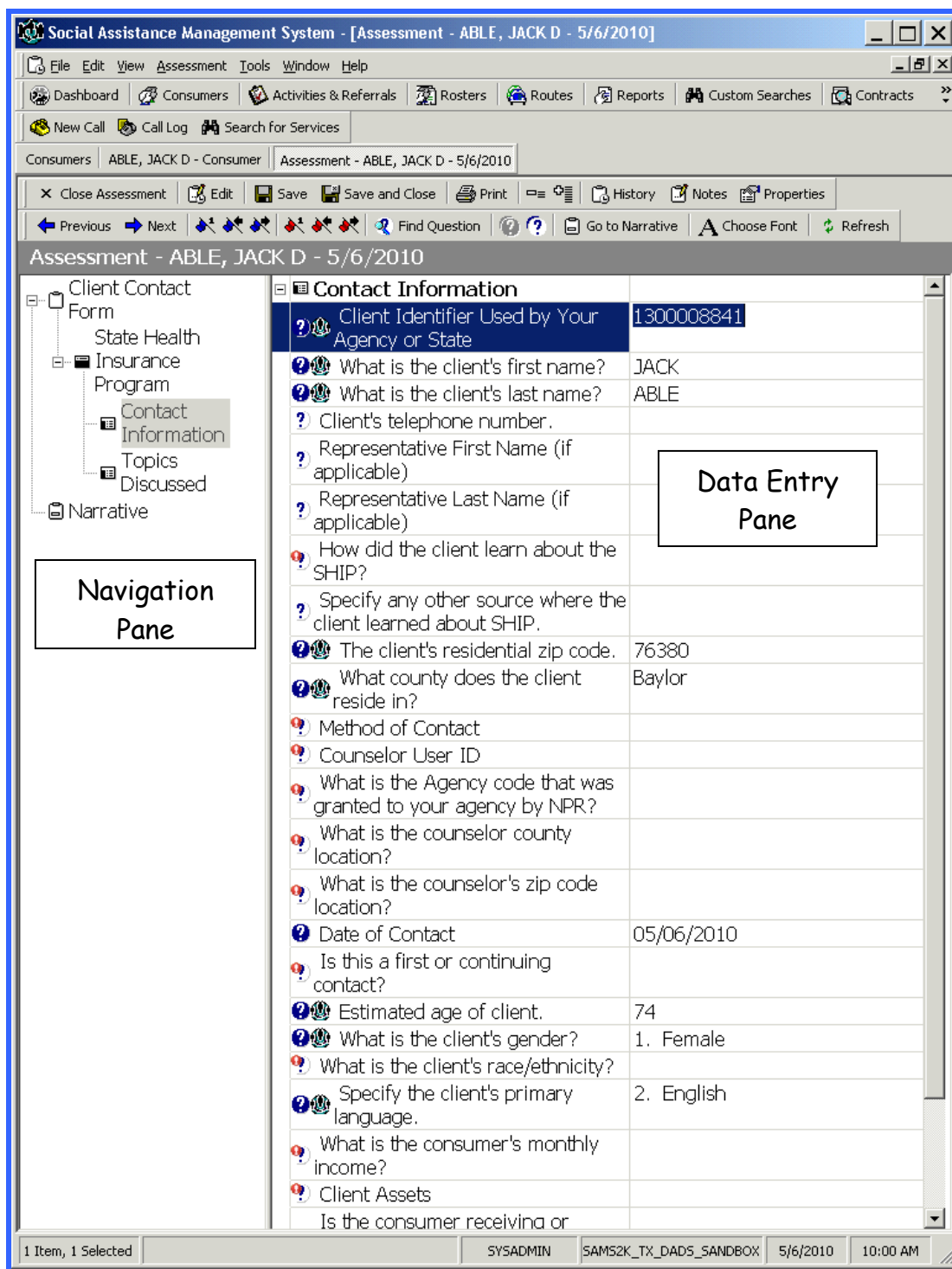


**Note:** The file extension .afm stands for "assessment form." You will see the label "Omnia" because the form is created for SAMS in a related module called Omnia Designer.

If the ICC form does not appear in the Filename field, and you cannot find the ICC form in your system, contact your AAA's SAMS Administrator.

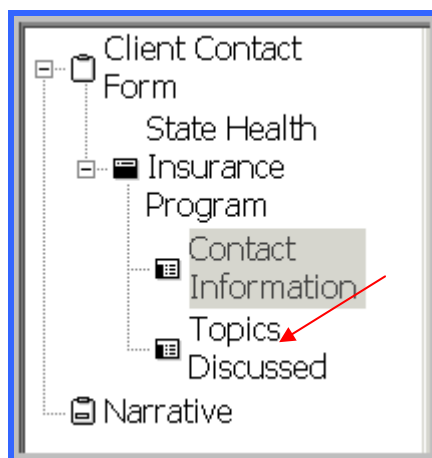
5. Click the **OK** button to open the form.



- 6. The ICC will open in a standard SAMS Assessment format, with a Navigation Pane on the left and a Data Entry Pane on the right.






7. To move from one section to another in the form, click the section in the Navigation Pane.






8. The method for data entry in the ICC will vary from field to field.
- If an arrow  appears on the right side of a field when clicked, an item must be selected from a dropdown list.
  - If an ellipsis button  appears when a field is clicked, an item or items must be selected from a pop up window.
  - If the response area remains blank when a field is clicked, free text entry is required.



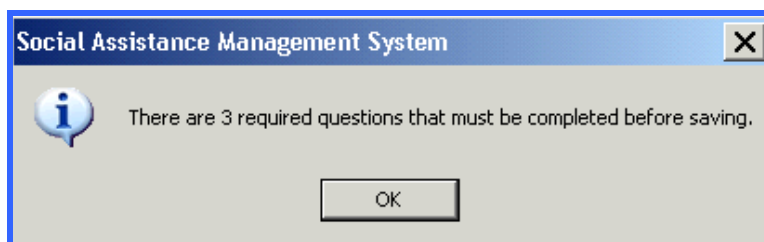
**Note:** Each field marked with a red exclamation point  is a required field.


All required fields must contain a response before the form can be closed.

9. After all required fields have been completed, the form can be saved or saved and closed by clicking the appropriate button in the toolbar.

Required questions can be located by using the red flags    in the toolbar.

10. If all of the required fields haven't been completed and you attempt to save or save and close the form, you will see a warning message:



11. Review the form and complete all of the questions that contain the required questions prompt  .
12. You will then be able to save or save and close the form.
13. If the consumer is aged 60 or over, a service delivery of *Legal Assistance* will automatically be added to the Consumer Record in the **Service Delivery** section.
14. If the consumer is under age 60, a service delivery *will not* be added to the record.



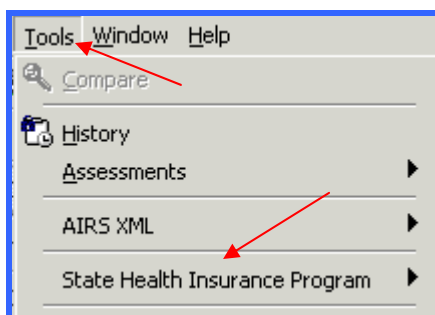
**Note:** See Printing on page 9. You can also print a blank ICC form, which can be used for manual recording of data when meeting with clients outside the office. You would select "Standard Layout without Responses" in the print window.

## PAM Form

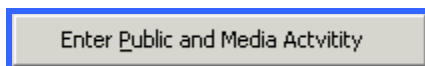
Entering data for the Public and Media Event form is done in the same manner as is done in the ICC form, however, because Public and Media events are not associated with individual consumers, the form is found in a different location within SAMS.

### Entering Data into the PAM Form

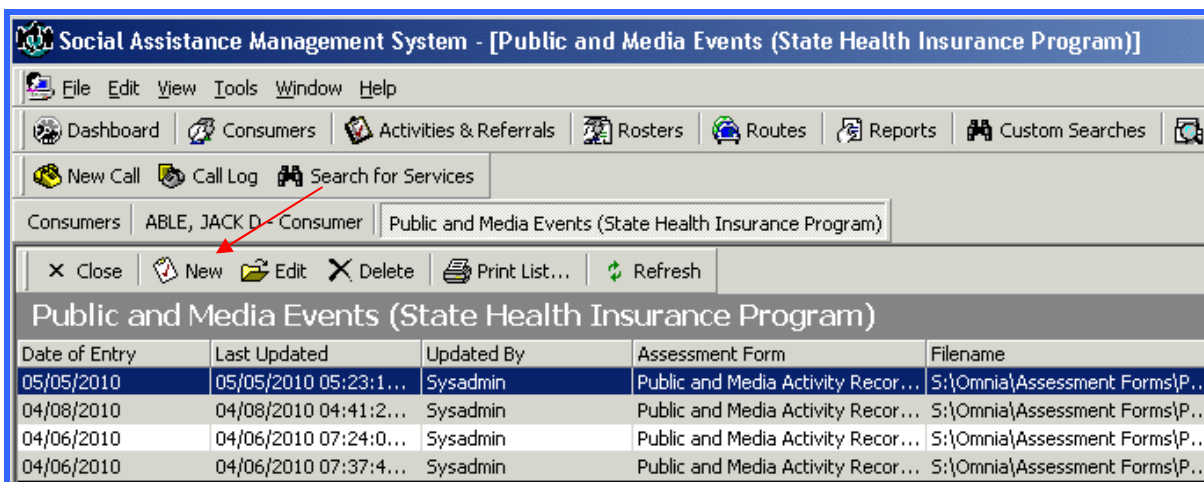
1. Click **Tools** in the menu bar, then click **State Health Insurance Program**.



2. Next, click **Enter Public and Media Event Activity**.




3. SAMS will open to a List Screen that shows previously completed PAM forms. To open a new form, click **New** in the toolbar.



4. A blank(new) PAM form will open.

Assessment - Anonymous - 5/6/2010																											
<ul style="list-style-type: none"> <li>[-] PAM Event                             <ul style="list-style-type: none"> <li>[-] Activity or Event                                     <ul style="list-style-type: none"> <li>[-] Activity Information   <ul style="list-style-type: none"> <li>1. Interactive Presentation to Public. Face to Face In-Person.</li> <li>2. Booth or Exhibit. At Health Fair, Senior Fair, or Special Event.</li> <li>3. Dedicated Enrollment Event</li> <li>Sponsored by SHIP or in Partnership.   <ul style="list-style-type: none"> <li>4. Radio Show. Live or Taped. Not a Public Service Announcement or Ad.</li> <li>5. TV or Cable Show. Live or Taped. Not a Public Service Announce or Ad.</li> <li>6. Electronic Other Activity. PSA's, Electronic Adds, Crawls, Video Conf, Web Conf, Web Char</li> <li>7. Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings</li> </ul> </li> </ul> </li> <li>[-] Presenters   <ul style="list-style-type: none"> <li>[-] Presenter #1</li> <li>[-] Presenter #2</li> <li>[-] Presenter #3</li> <li>[-] Presenter #4</li> <li>[-] Presenter #5</li> <li>[-] Presenter #6</li> <li>[-] Additional Presenters</li> </ul> </li> <li>[-] Narrative</li> </ul> </li> </ul> </li> </ul>	<table border="1"> <thead> <tr> <th colspan="2">Activity Information</th> </tr> </thead> <tbody> <tr> <td>Start Date of Public or Media Event</td> <td></td> </tr> <tr> <td>End Date of Public or Media Event</td> <td></td> </tr> <tr style="background-color: #000080; color: white;"> <td>Event or Group Name</td> <td></td> </tr> <tr> <td>SHIP Event Contact First Name</td> <td></td> </tr> <tr> <td>SHIP Event Contact Last Name</td> <td></td> </tr> <tr> <td>SHIP Event Contact Phone</td> <td></td> </tr> <tr> <td>Street Address of Event</td> <td></td> </tr> <tr> <td>Zip Code of Event</td> <td></td> </tr> <tr> <td>Event Topic Focus</td> <td></td> </tr> <tr> <td>Other Event Topic Focus</td> <td></td> </tr> <tr> <td>Event Target Audience</td> <td></td> </tr> <tr> <td>Other Event Target Audience</td> <td></td> </tr> </tbody> </table>	Activity Information		Start Date of Public or Media Event		End Date of Public or Media Event		Event or Group Name		SHIP Event Contact First Name		SHIP Event Contact Last Name		SHIP Event Contact Phone		Street Address of Event		Zip Code of Event		Event Topic Focus		Other Event Topic Focus		Event Target Audience		Other Event Target Audience	
Activity Information																											
Start Date of Public or Media Event																											
End Date of Public or Media Event																											
Event or Group Name																											
SHIP Event Contact First Name																											
SHIP Event Contact Last Name																											
SHIP Event Contact Phone																											
Street Address of Event																											
Zip Code of Event																											
Event Topic Focus																											
Other Event Topic Focus																											
Event Target Audience																											
Other Event Target Audience																											

5. Complete the form using the same data entry methods as used in the ICC form - dropdown lists, popup windows, and free text. Be certain to complete all required  fields.

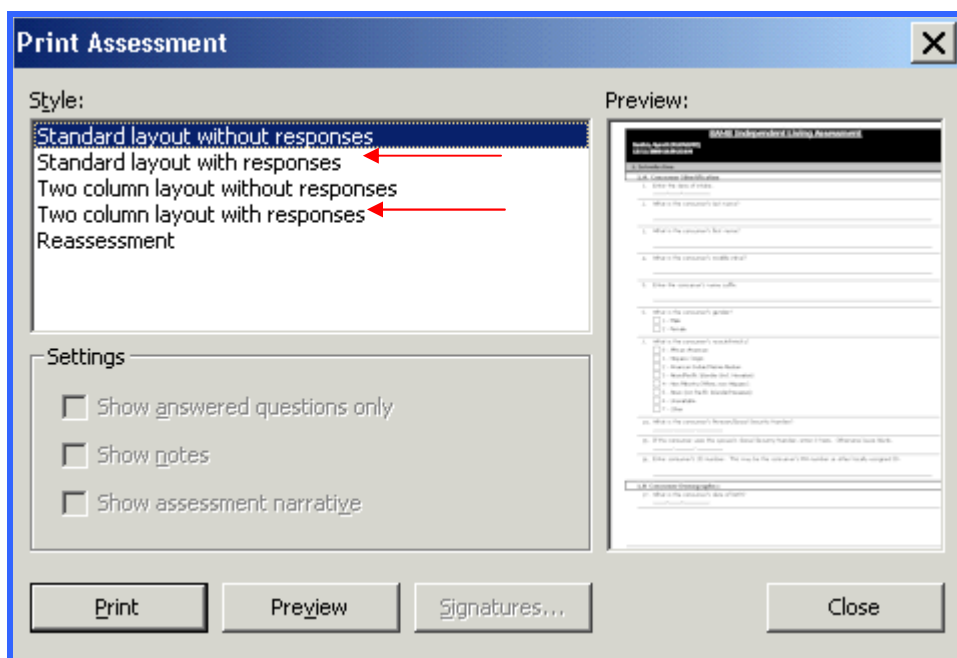
6. After all required fields have been completed, the form can be saved, or saved and closed.

## Printing Completed Forms

After an ICC or PAM form has been completed, it can be printed for use when you enter the data into the SHIPtalk website.

To print a completed form:

1. Open the ICC or PAM form and click **Print** in the toolbar.
2. In the Print dialog box that appears, select either *Standard Layout with Responses* or *Two Column Layout with Responses*.



3. To view the form before printing, click the Preview button.
4. To print the form without viewing it first, click Print.