AGD

User Guide: AFC & GAFC Providers

AFC Providers Only: ***Beginning May 1, 2019 Adult Foster Care (AFC) will no longer use the AGD system for clinical determinations. All AFC providers are required to submit AFC Prior Authorization (PA) requests through the MassHealth LTSS Provider Portal (www.masshealthltss.com). For PA support, email support@masshealthltss.com or call the LTSS Provider Service Center (844) 368-5184. GAFC providers continue to use the AGD process until further notice.***

Purpose of User Guide

This User Guide is intended for providers of Adult Foster Care/Group Adult Foster Care (AFC/GAFC) services who will utilize **AGD Direct:** the new streamlined process for submitting application materials through a secure web-based system. The guide is for users who do not necessarily have familiarity with the Elder Affairs' consumer database Social Assistance Management Software (***SAMS)***. The guide contains basic ***SAMS*** user information as it relates to the specific functions that the AFC/GAFC provider must perform to submit materials to the designated ASAP, Coastline Elderly Services.

Much more detailed information on SAMS itself can be found in the *SAMS 3.1 Training Manual*. The manual, along with additional training materials, are available on the **Harmony Customer Portal** under *Application Support Resources*.

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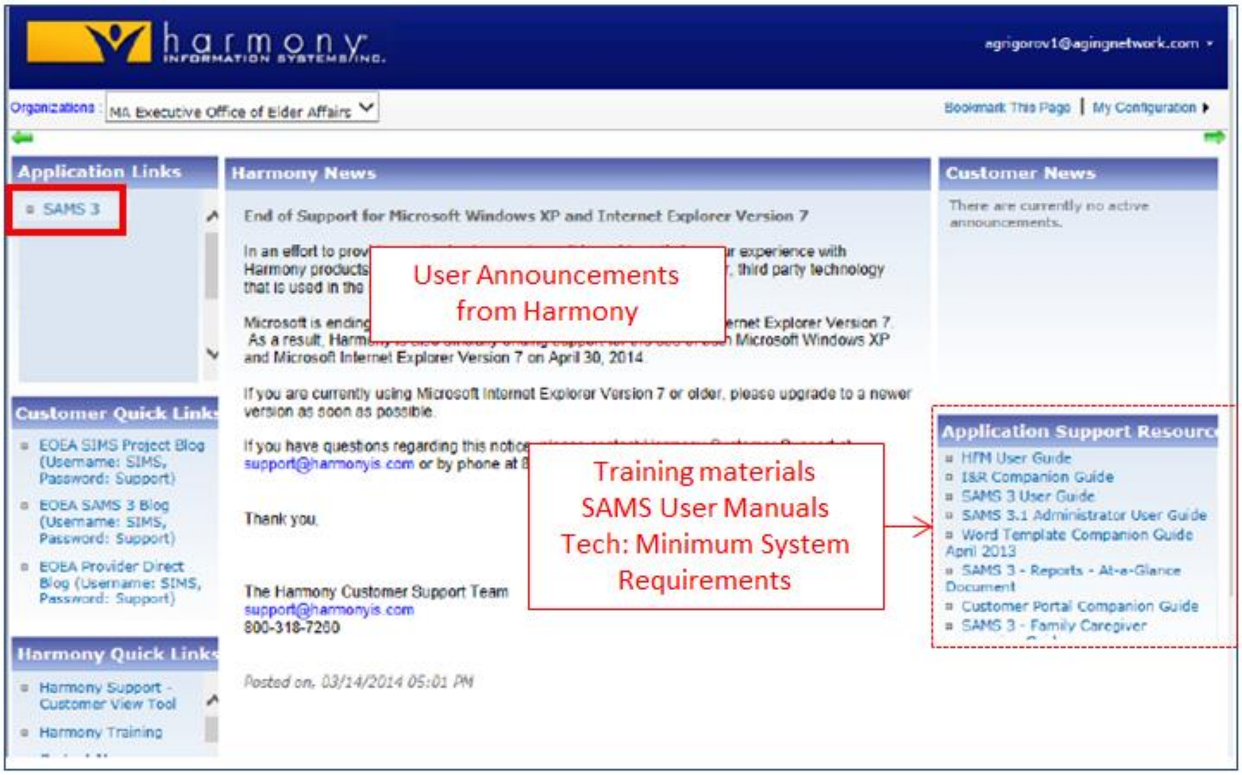
Accessing SAMS

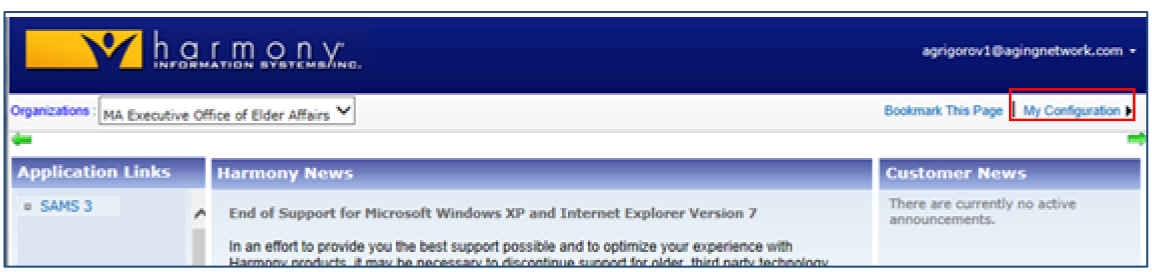
Harmony Customer Portal

In order to use AGD, you must have an active **Harmony Customer Portal** account. Through the Portal you can access ***SAMS***, manage your user account, including password reset questions, locate support resources, and view training videos and interactive programs.

As an approved AGD provider, credentials to access this account (username and temporary password) will be provided to you by email, as requested by one of your organization's AGD Point Persons. Once logged in, you will be prompted to create a new password, and answer 3 security questions (in case the password is forgotten.) You will then be brought to the main screen of the **Harmony Customer Portal**. ***SAMS*** can be found under *Application Links* on the left side of the screen.



You can change your password and/or security information by selecting the *My Configuration* link on the upper right portion of the screen.



New User Accounts

AGD Point Persons are responsible for user account management and your organization's administrative security and access to Personal Health Information (PHI), including appropriate activation and termination of users. Instructions on how to request new Harmony/SAMS accounts for AGD Providers (both non-ASAP and ASAPs) can be found in the Support section of this manual, under Activating / Deactivating Users.

Installing Microsoft Silverlight

Prior to using SAMS for the first time, you will need to install Microsoft Silverlight on your computer. This process takes less than a minute and requires no special technical skill.

When ***SAMS*** is opened (by clicking the link under *Application Links*) the first time on your work station, this message may display:

Simply click the "Click now to install" button and follow the instructions to complete the installation.

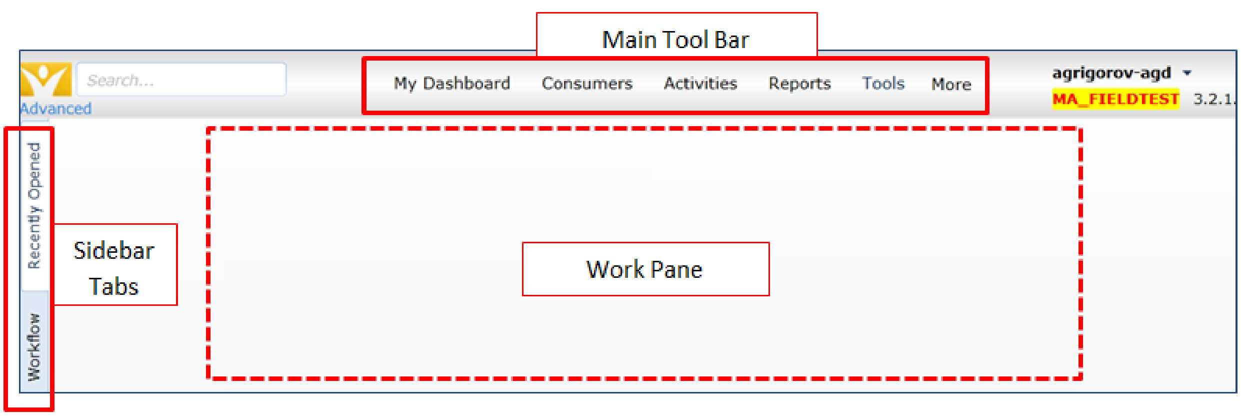
[For optimal performance, SAMS should be used with Internet Explorer. For more details on system requirements, see System Requirements & Browser Configuration for Operating SAMS]

SAMS "101"

Screen Layout

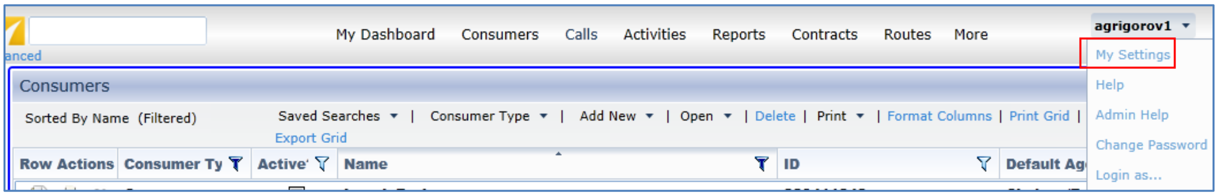
The Main Screen in ***SAMS*** has three distinct sections:

- The *Main Tool Bar* contains buttons that will open the various sections of the application. It also displays the logged in username and database, as well the Search field.
- The *Work Pane* displays the lists and screens that are found throughout the application, each of which contains its own toolbar.
- The *Sidebar Tabs* allow users to quickly move to recently opened screens, and follow through on any Workflows that have been generated.



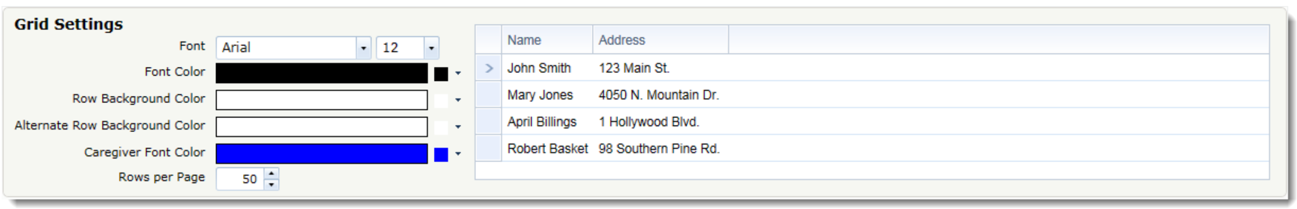
My Settings

The *My Settings* screen allows the user to tailor the look of their application, saving data entry time. To view *My Settings*, click on your username in the upper right corner of the SAMS screen, then select *My Settings*.



Grid Settings

Grid Settings are used to modify the display of on-screen colors, fonts for all SAMS lists and data areas.

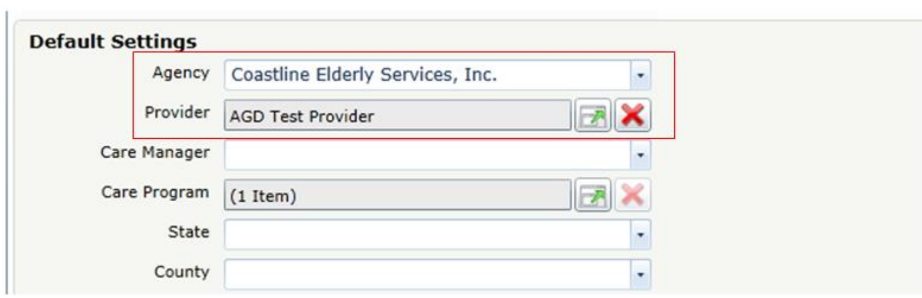


Default Settings

Default Settings in SAMS, once configured, automatically enter any user-defined default values when creating new records.

For AGD providers, there are 2 important default values to set when you begin using the system: *Agency and Provider*. This step is essential to ensure that the AGD workflow proceeds smoothly.

As shown below, the default Agency should be set to Coastline Elderly Services, Inc.*



*Note for **ASAP** AGD Users: it is not necessary to change the default Agency to Coastline Elderly Services; you can maintain your agency as the default if this is your practice.

Please be aware, however, that when you create an Activity and Referral as part of your submission that you must select Coastline as the Agency (see Add Activity section, page 31.)

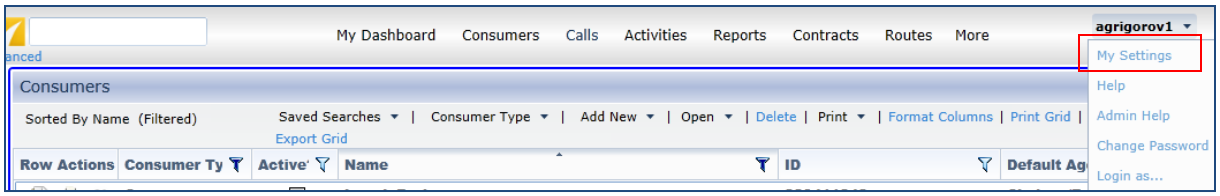
Using Your Dashboard: Basics & Saved Search *Widgets*

The SAMS **Dashboard** allows users to quickly view the status of ongoing tasks related to AGD. These tasks are tracked with ***Activities*** in SAMS, which are an important part of the work process. *The AGD Process – Step by Step* section of this manual shows how an Activity is created as part of the AGD process.

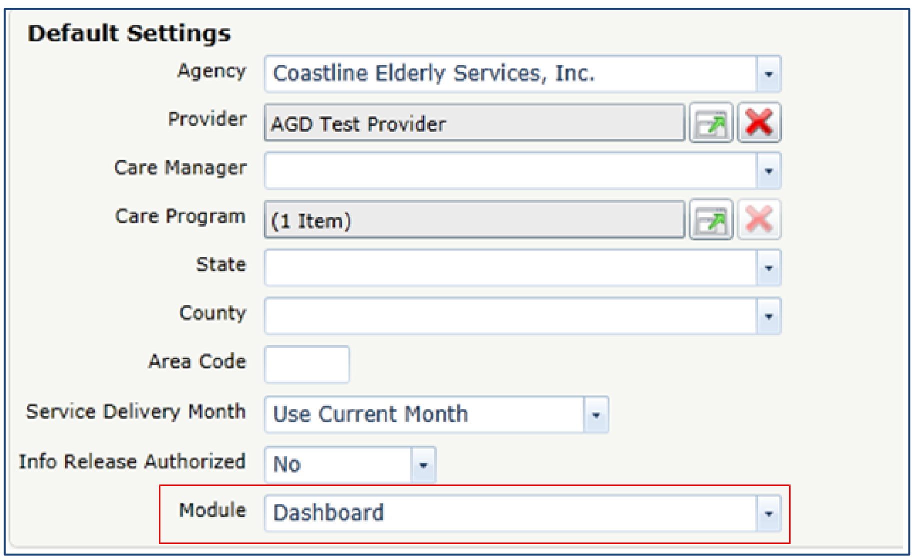
Users can choose to have their Dashboards open as soon as they log in to the application, so that critical information affecting their caseloads and Consumers is at their fingertips. The Dashboard consists of individual panels or "widgets" that display links to specific consumer data. You can determine how many widgets are displayed at all times and each one can be filtered to refine the amount of data that displays.

Opening the Dashboard

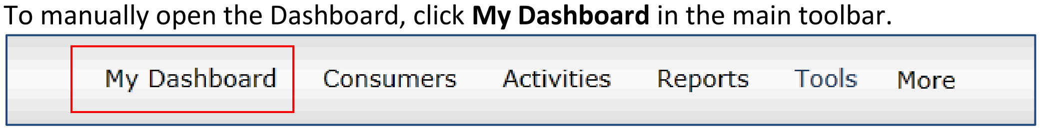
To set your Dashboard to automatically open upon SAMS login click on your username in the upper right corner of the SAMS screen, then select *My Settings.*



...and set **Default Settings** >> **Module** to: **Dashboard**



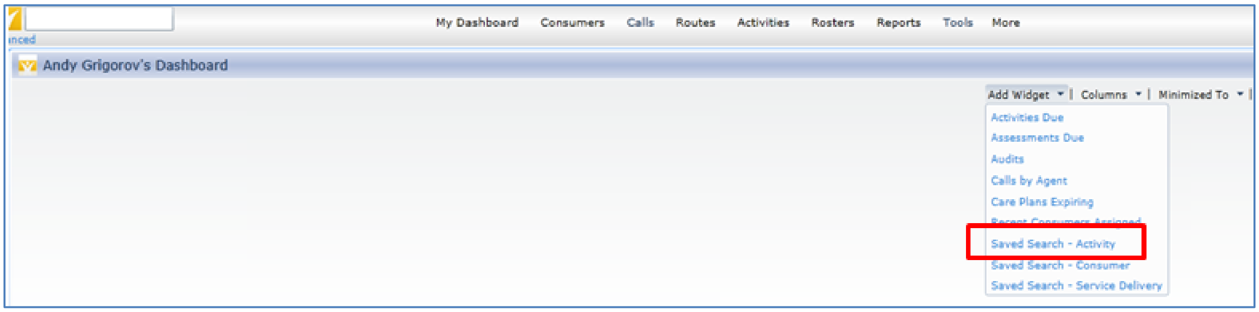
To manually open the Dashboard, click **My Dashboard** in the main toolbar.



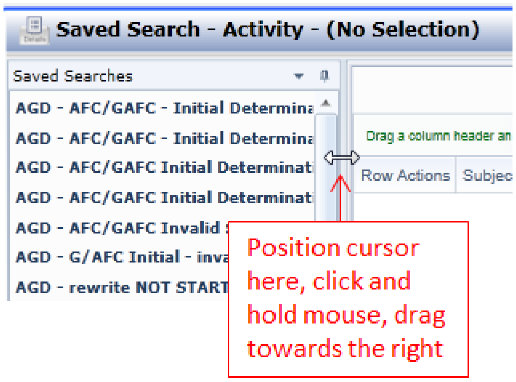
Adding Saved Search "Widgets" to Your Dashboard

You will need to manually add widgets to your dashboard screen, so activities related to AGD are visible. The steps for configuring widgets are shown below. There are a number of *saved search widgets* that have already been created, which will be helpful in your work as an AGD provider. (They are listed at the end of this sub-section.) Users may also create and save their own Saved Searches.

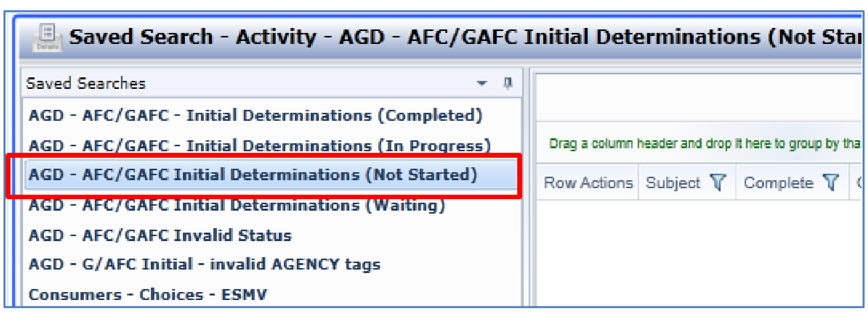
1. From the blank Dashboard screen, click *Add Widget,* and select *Saved Search - Activity* on the upper right side of the screen.



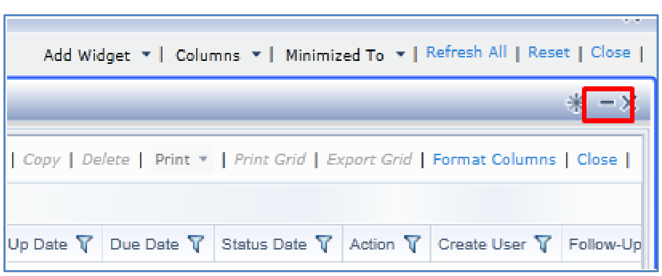
2. A list of Saved Searches will appear on the left. If you cannot read the full names, click on the divider that separates the list from the rest of the widget, and drag to the right.



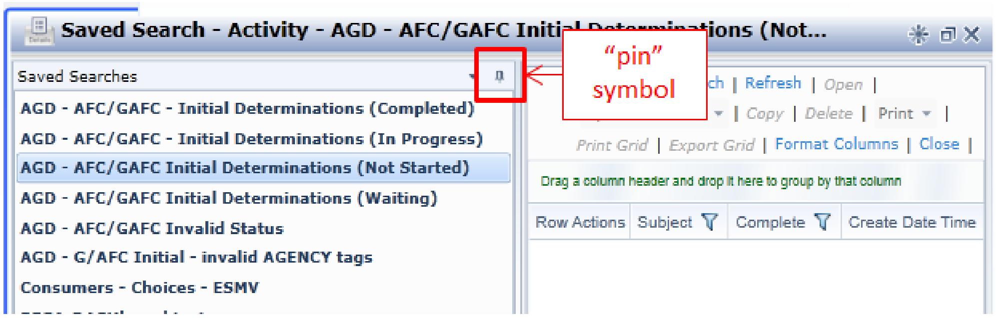
3. Select desired Saved Search. In this example the *AGD – AFC/GAFC Initial Determinations (Not Started)* widget is selected. Results of the search, if any, will appear on the right hand side of the widget.



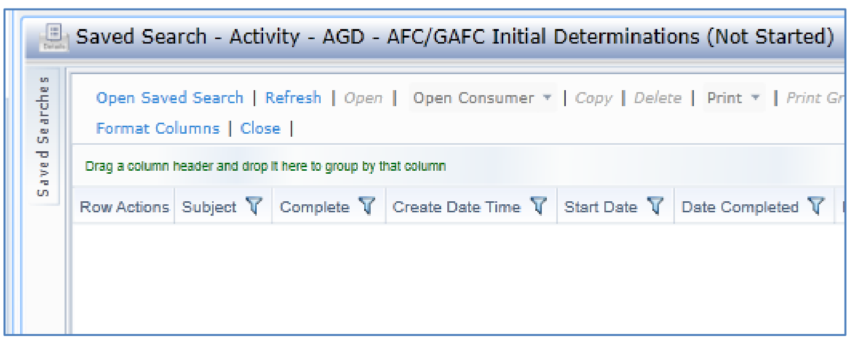
4. Minimize your newly created widget by clicking the minimize symbol in the upper right corner.



5. Follow the same process to add all desired widgets. (Recommended widgets for AGD Providers are listed here.) To hide the Saved Search list within the widget, click on the "pin" symbol in the upper right of the displayed list.



This is how the widget looks after unpinning the Saved Search list. Click the *Saved Searches* button on the left to once again display the list.



Once your dashboard is set up, by clicking the *Maximize* window symbol in the upper right corner of the widget you can expand the display size of a widget to full screen dimensions.

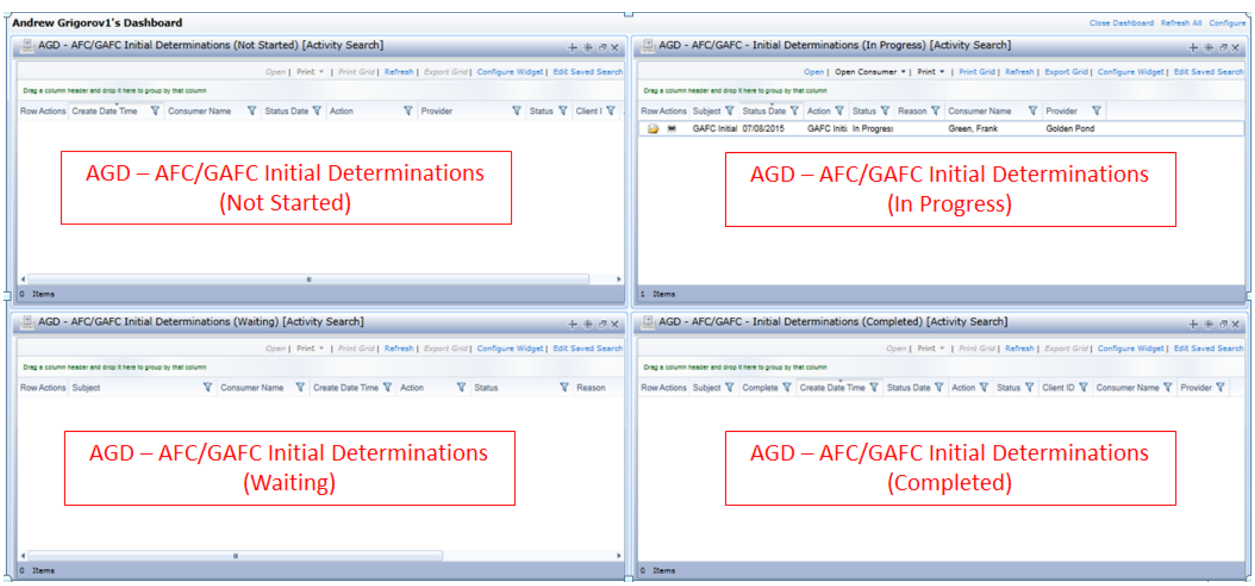
This is a list of recommended SAMS dashboard widgets for AGD Providers which have been created for this process. Additional widgets of various types are available which can be added by the user, according to their preference. (Users can also create their own widgets. Consult the *SAMS 3 User Guide* under *Application Links* on the Harmony Portal page for more details.)

Note: All the widgets noted here are listed under *Activity* type. Another useful widget for tracking completed Determinations is found under *Delivery* type, *AGD Completed Determinations (service delivery).* More information on using widgets to track Determination activity in SAMS can be found in the View Determinations section of this guide.

Widget Name	Description
AGD – AFC/GAFC – Initial Determinations (Not Started)	Listing of all AFC/GAFC Activities with a status of *Not Started*
AGD – AFC/GAFC – Initial Determinations (In Progress)	Listing of all AFC/GAFC Activities with a status of *In Progress*
AGD – AFC/GAFC Initial Determinations (Waiting)	Lists any AFC/GAFC Activities that have been received by Coastline Elderly Services and were found to be incomplete. The details of the missing items are contained within the Activity record.
AGD – AFC/GAFC – Initial Determinations (Completed)	Listing of all AFC/GAFC Activities with a status of *Completed*

Recommended Dashboard Layout for AFC/GAFC Providers:

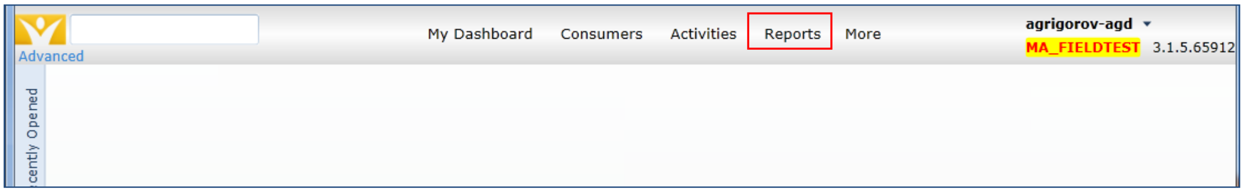
To make it easy to track the progress of your submissions, it is recommended that providers place these 4 widgets on their dashboards:



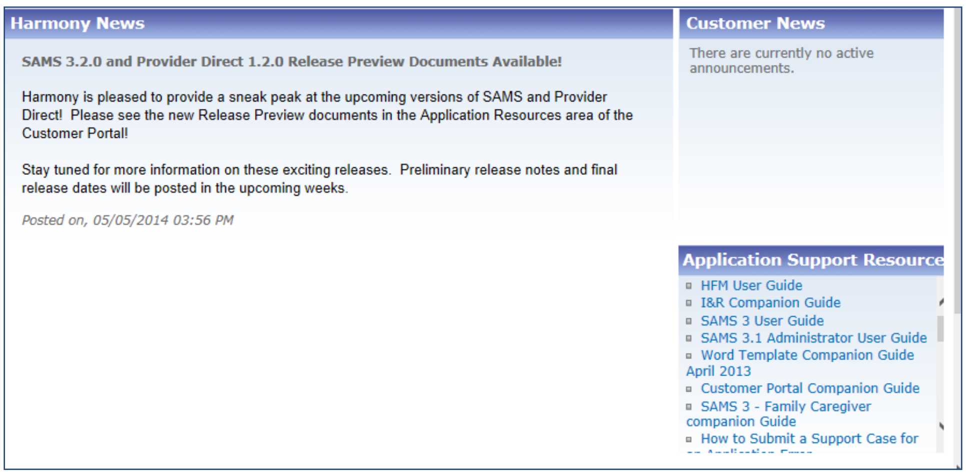
Using Reports to Track AGD Activity

AGD Providers can choose to use SAMS *Reports* as a way to track AGD activity in addition to, or instead of, Dashboards.

Access *Reports* from any screen in SAMS by clicking on the section name the Main Toolbar.



For detailed information on creating and using your own reports, consult the SAMS 3 User Guide located under Application Links on the Harmony Portal.



Working with Data Grids

In many sections of SAMS, items appear in *Data Grid* Screens. These screens can display data more effectively when the available filtering and sorting options are used. In addition, columns in a Data Grid view can be moved, resized, removed or added. The examples shown in this section of the manual will use the Activities list, but the features shown are consistent across all data grids in SAMS.

Data Grid Layout

Data Grids across the application have a common look and feel, offering consistency every time you utilize them across the application. Each grid will contain the following:

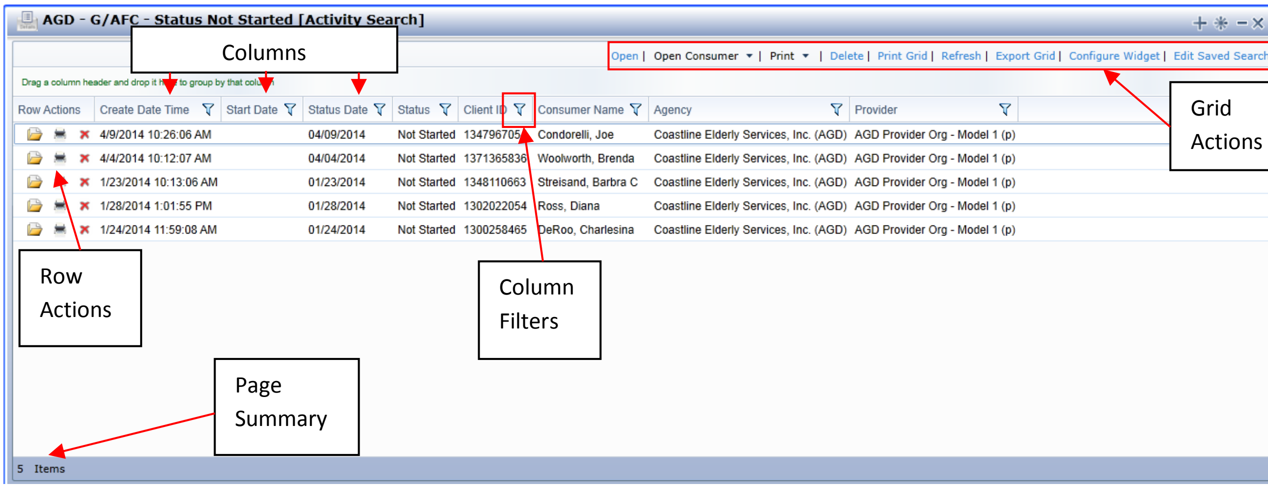
Columns: Data is arranged within columns, which can easy be sorted so users see the data that they need to see at all times. Clicking on a column heading will sort the column, and clicking again will reverse the sort. Users can sort by any column that is on the screen.

Column Filters: Users can set filters on individual columns to hide data that they do not wish to see. For instance, if the user filters by last name of “Smith” they will only see consumers with the last name of “Smith” on the screen, and all other consumers will be hidden.

Row Actions Column: Icons allowing you to conduct commonly use tasks with a single click, such as adding entries, deleting entries, or printing.

Grid Actions: Standard tasks found on all data grids, allowing each grid to be printed, exported and more.

Page Summary: The bottom of each screen, when necessary, presents the grand total of items in the database, and on the current page, and also allows users to easily navigate from page to page. While the grand total is always visible, the paged data will only be showing if the data you are reviewing spans across multiple pages.

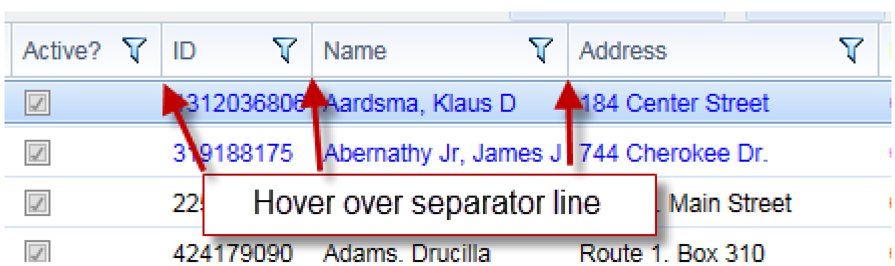


Below is a sampling of the options that Data Grids offer in SAMS.

Resizing Columns on Data Grids

If you are unable to see all the data within a column, it may be necessary to widen the column by resizing it.

1. Move your mouse over the right side of the column header that needs resizing until the cursor changes to a double-sided arrow.



2. Click and hold the mouse button down, and drag the line that appears left or right as needed to resize the column.

3. Release the mouse button, and the column is resized.

Note: You can also resize a column to fit its contents by double clicking directly on a separator line.

Using Filters on Data Grids

SAMS provides several ways to locate and access data, including the powerful grid and column filters.

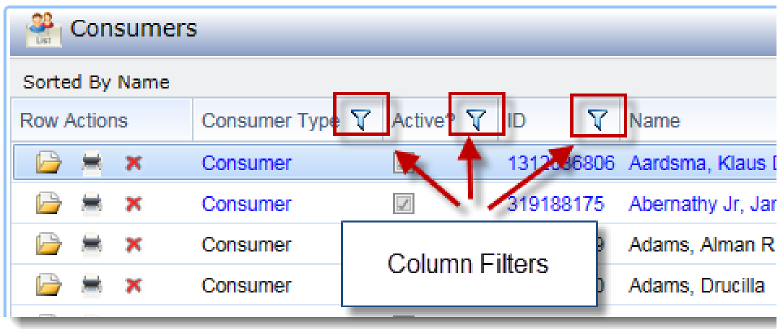
Tip: Not sure if you need to **sort** the records or **filter** them?

A ***sort*** will return all the records you started with; they'll just be displayed in a different order. A ***filter*** will reduce the number of records returned to you, making some of the records go away so you can more easily see the ones that remain.

By default, SAMS displays only those records that you are allowed to see. Using filters can reduce the records displayed to a manageable number, enabling you to more rapidly find the Consumers or other data you may need.

A nice feature of filters is that you can apply more than one filter at a time. It is possible, for instance, to filter the list for Consumers in Active status having the Last name of Smith and an address in a specific town.

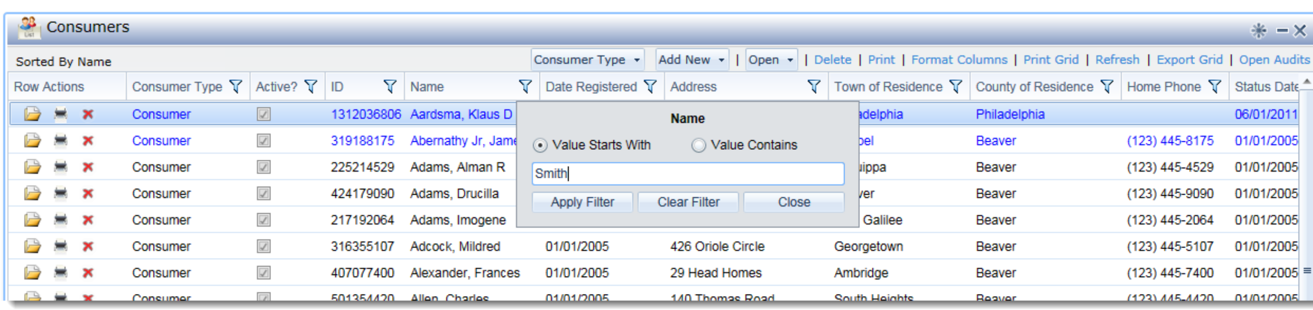
Column filters: Users can filter by data in any column by clicking on the filter icon.



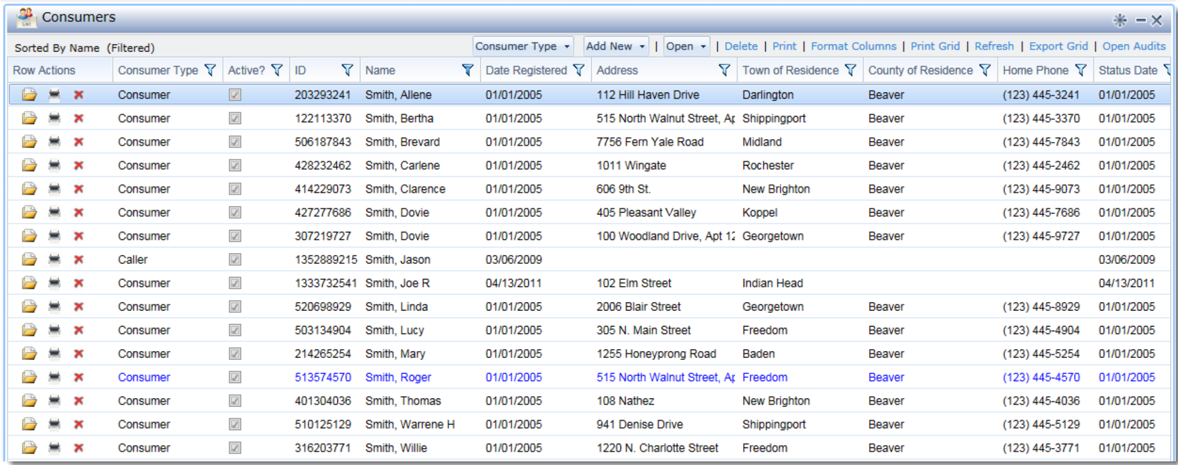
Utilizing Column Filters

Column Filters can easily be set by clicking on the filter icon found in the column containing the data you'd like to analyze.

1. Click on the **Filter** icon in the Name column
2. Type in the name you'd like filter your list on



3. Press **Apply Filter**. Your Consumer List will now contain only consumers with the name that you entered and the filter icon has changed colors so you know that you're filtering the list by data in that column. The bottom of the screen will show you how many items are appearing as a result of the filter.

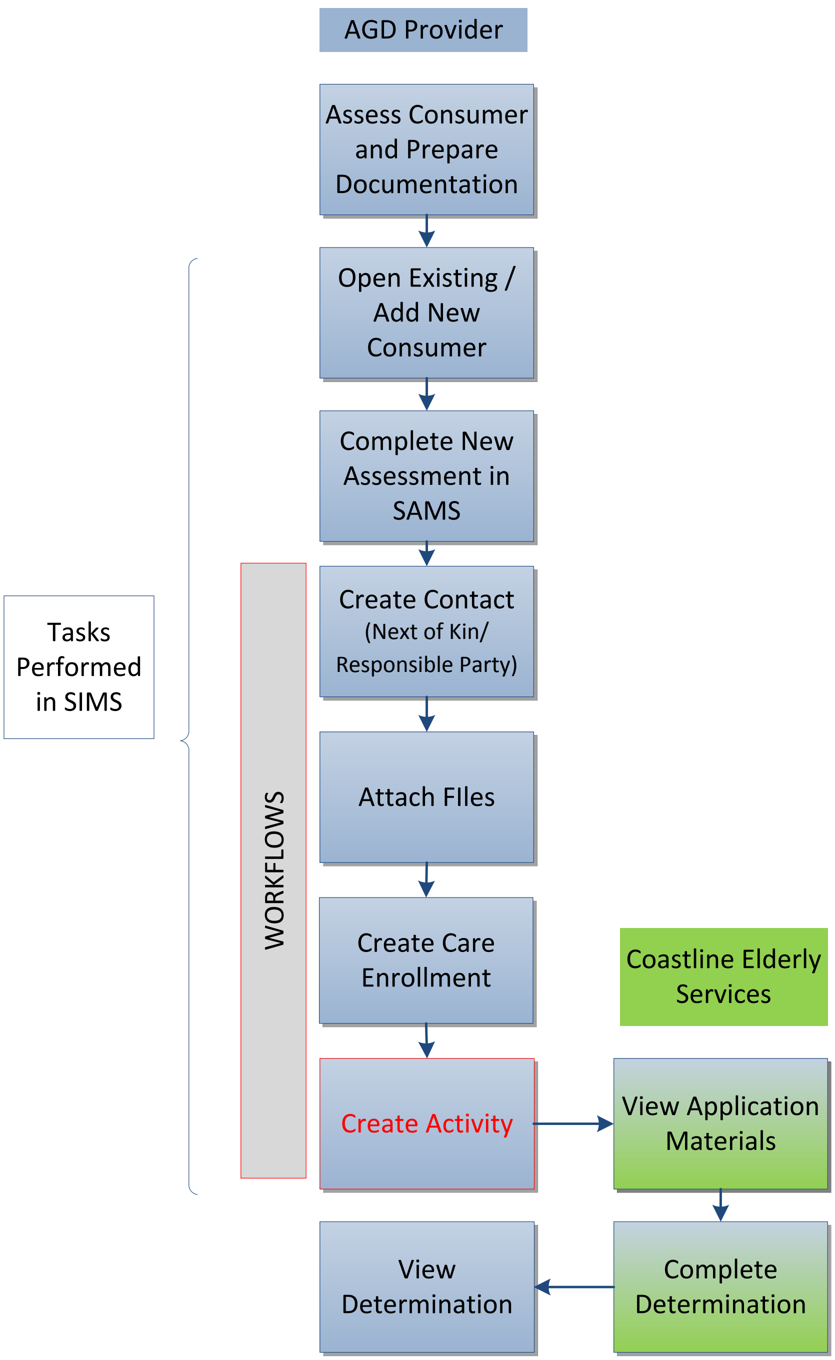


Row Actions	Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence	County of Residence	Home Phone	Status Date
	Consumer		203293241	Smith, Allene	01/01/2005	112 Hill Haven Drive	Darlington	Beaver	(123) 445-3241	01/01/2005
	Consumer		122113370	Smith, Bertha	01/01/2005	515 North Walnut Street, Ap	Shippingport	Beaver	(123) 445-3370	01/01/2005
	Consumer		506187843	Smith, Brevard	01/01/2005	7756 Fern Yale Road	Midland	Beaver	(123) 445-7843	01/01/2005
	Consumer		428232462	Smith, Carlene	01/01/2005	1011 Wingate	Rochester	Beaver	(123) 445-2462	01/01/2005
	Consumer		414229073	Smith, Clarence	01/01/2005	606 9th St.	New Brighton	Beaver	(123) 445-9073	01/01/2005
	Consumer		427277686	Smith, Dovie	01/01/2005	405 Pleasant Valley	Koppel	Beaver	(123) 445-7686	01/01/2005
	Consumer		307219727	Smith, Dovie	01/01/2005	100 Woodland Drive, Apt 1:	Georgetown	Beaver	(123) 445-9727	01/01/2005
	Caller		1352889215	Smith, Jason	03/06/2009					03/06/2009
	Consumer		1333732541	Smith, Joe R	04/13/2011	102 Elm Street	Indian Head			04/13/2011
	Consumer		520698929	Smith, Linda	01/01/2005	2006 Blair Street	Georgetown	Beaver	(123) 445-8929	01/01/2005
	Consumer		503134904	Smith, Lucy	01/01/2005	305 N. Main Street	Freedom	Beaver	(123) 445-4904	01/01/2005
	Consumer		214265254	Smith, Mary	01/01/2005	1255 Honeyprong Road	Baden	Beaver	(123) 445-5254	01/01/2005
	Consumer		513574570	Smith, Roger	01/01/2005	515 North Walnut Street, Ap	Freedom	Beaver	(123) 445-4570	01/01/2005
	Consumer		401304036	Smith, Thomas	01/01/2005	108 Nathez	New Brighton	Beaver	(123) 445-4036	01/01/2005
	Consumer		510125129	Smith, Warrene H	01/01/2005	941 Denise Drive	Shippingport	Beaver	(123) 445-5129	01/01/2005
	Consumer		316203771	Smith, Willie	01/01/2005	1220 N. Charlotte Street	Freedom	Beaver	(123) 445-3771	01/01/2005

You can set as many different column filters as you'd like on one screen, and your filters will be retained even if you log out of the application.

The ADG Direct Process – Step by Step

This summary workflow diagram shows the AGD Direct process. Each step is detailed in the following sections.



The following steps guide you through the submission of application materials for AFC or GAFC determinations.

Assess Consumer & Prepare Documentation

1. Perform on-site assessment of consumer using the MDS-HC.

2. Assemble all paper documents (Request for Services, Physician Summary Form, AFC Cover letter if necessary) with ink signatures, and scan to individual PDF files so they are available on your computer.

Conduct Search: Open Existing/ Add New Consumer

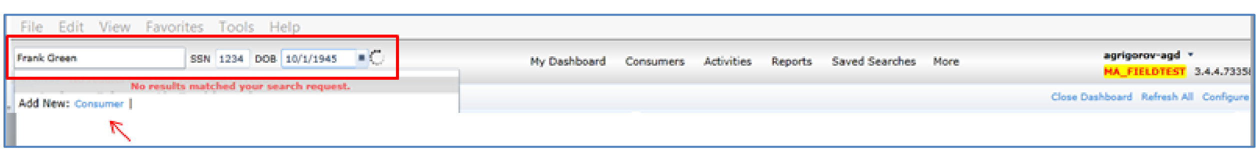
3. Log on to the Harmony Portal, and open SAMS.

4. Perform your initial search: Enter all 3 required search items and double check name spelling, SSN (last 4 digits), and DOB to ensure they are accurate. Note that SAMS will not return a matching record (if it exists) until all 3 items have been entered.

Note 4.a: Tips to Avoid Creating Consumer Duplicates

- Pay careful attention at the very beginning of the process – double check for accuracy.
- Check the MassHealth Provider Online Service Center (POSC) to verify the consumer's eligibility. Your accuracy at this point will locate a matching record, if it exists, and no duplicate record is created.
- After you enter the information, give SAMS a moment to search for and find the matching consumer record. For some users, the record will appear immediately- but for some there will be a slight delay. To engage the SAMS search, sometimes it is necessary to click your cursor into the name field as a final step.
- You will notice that SAMS is engaged in a search when you see a search processing icon appear temporarily to the right of the DOB field.
- If SAMS locates the record it will appear directly beneath the search fields

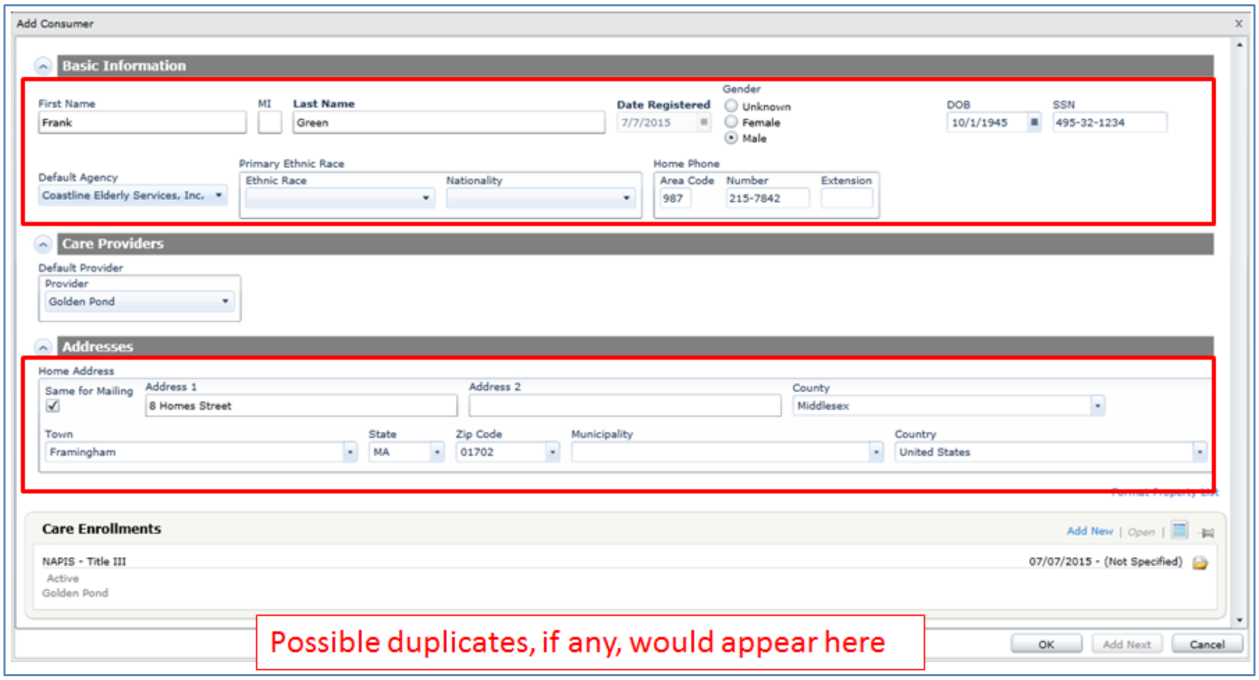
5. If the desired consumer *does not* appear (as shown in the example above), click *Add New: Consumer* just below the "No results matched your search request" message.



5a. If the consumer you are working with *does* appear, proceed to **Step 9**.

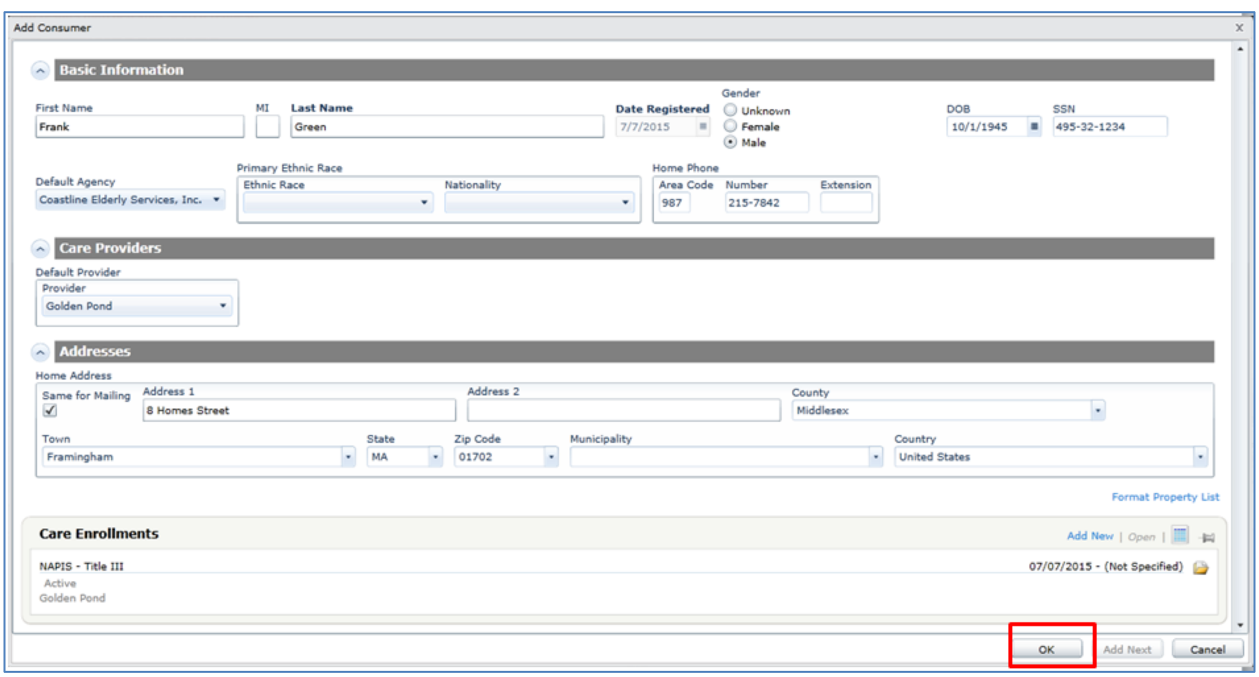
6. On the Add Consumer screen, add name, date of birth, gender, address, city, state, home phone number, and zip code. Only add information to fields within the red boxes shown below. *Do not change any Care Provider of Care Enrollment information.*

If there are any potential duplicate consumers, they will be displayed in a listing below the data fields.

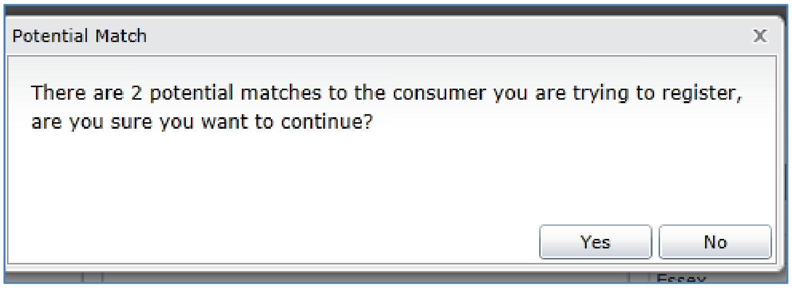


7. If the consumer you are searching for is found within the list of possible duplicates on this screen, select that consumer from the list and click *OK*. Be cautious when entering information in an existing consumer record not to change any data entered by another user. *Then proceed to **Step 9.***

   If the consumer *does not* appear in the duplicates list, continue creating the new consumer by clicking *OK* as indicated below.

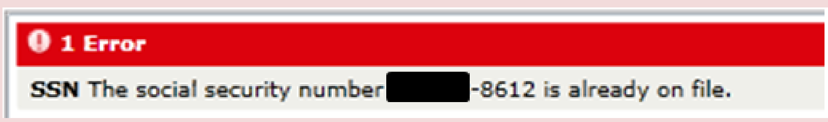


8. You will see a screen notifying you if there are duplicates, and asking if you would like to continue. Simply click *Yes* if you are certain that this is not a duplicate consumer you are creating.



Note 8.a: What to do if SAMS does not allow you to create new consumer due to conflict with SSN?

On occasion, you may find that when you are creating a new consumer (after conducting search and not finding said consumer), SAMS will present an error message stating that the SSN already exists in SAMS and not allow you to continue:



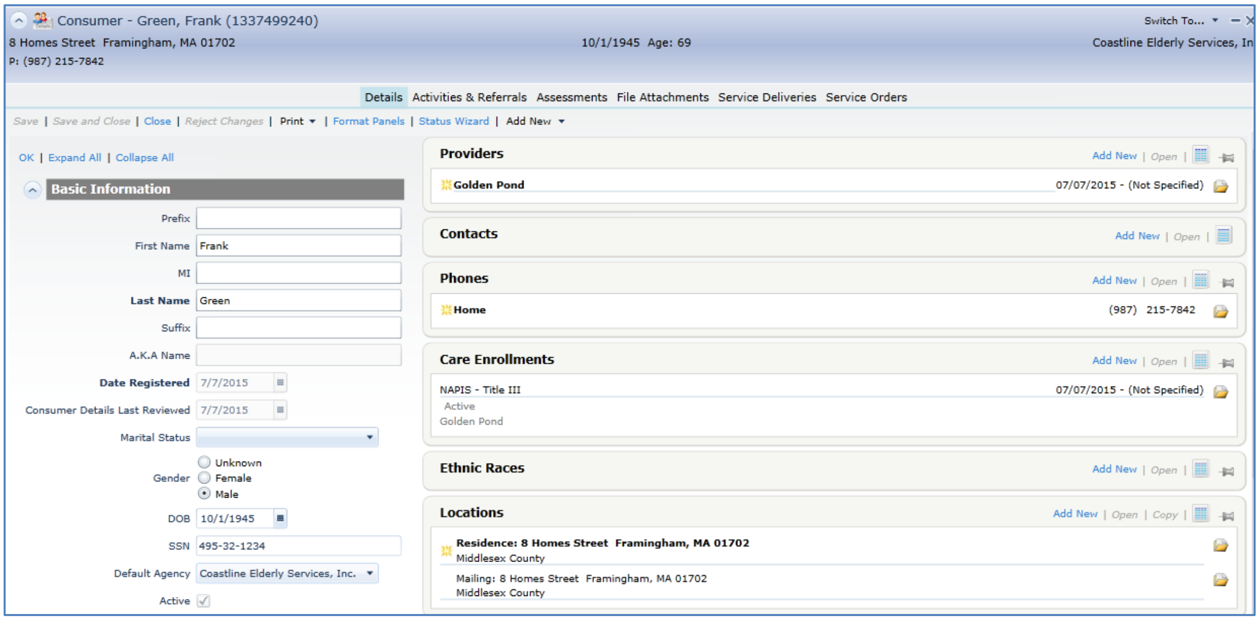
This is due to data conflict within SAMS involving the SSN and/or the DOB.

If you encounter this error message, follow these steps:

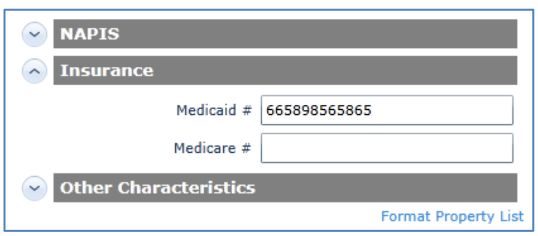
1. Cancel out of the 'Add Consumer' screen.
2. Review SSN and DOB to confirm that they were entered correctly. Consult the **Provider Online Service Center** to verify. Re-try consumer search.
3. If confirmed accurate, send a secure email to AGD Support including a description of the issue, and SSN and DOB for the consumer in question.
4. AGD Support will lookup existing consumer in SAMS to determine if it's the same person or different person:
   a. If consumer in SAMS is a match (same person), AGD Support will correct SSN then alert provider that problem has been fixed.
   b. If consumer does not match (same SSN on different person), AGD Support will send provider email instructing them to proceed with Submission but omit SSN. AGD Support will also follow up with CM for existing consumer to let them know that we believe their consumer has incorrect SSN.

Complete New Assessment in SAMS

9. This will load the Consumer Summary page for your newly created consumer (or for the existing consumer if you did not need to create a new one.)



10. Check/add Medicaid Number: Scroll down the page to the *Insurance* Section on the left side. Click the arrow to reveal the available fields. If this is a new consumer, or an existing consumer and no number is present, enter it now.



Note 10.a: Regarding Medicaid Numbers

If there is a number present that does not match the Medicaid number you have for this consumer, note this information in the comments section of the Activity, detailed in the Add Activity section.

If the status of the Medicaid application is pending, note the exact application date (e.g. 9/4/2014) in the comments section of the Activity, detailed in the Add Activity section. This date should also be entered on the Request for Services form.

If you save the record without entering the Medicaid number, you will not be able to add it in the same way later. It can be entered as part of the assessment completion process. Be sure to add a note to the Activity and Referral comment field with the verified number. [If you need to add the Medicaid number after the assessment is complete, go to step 17.a. for instructions.]

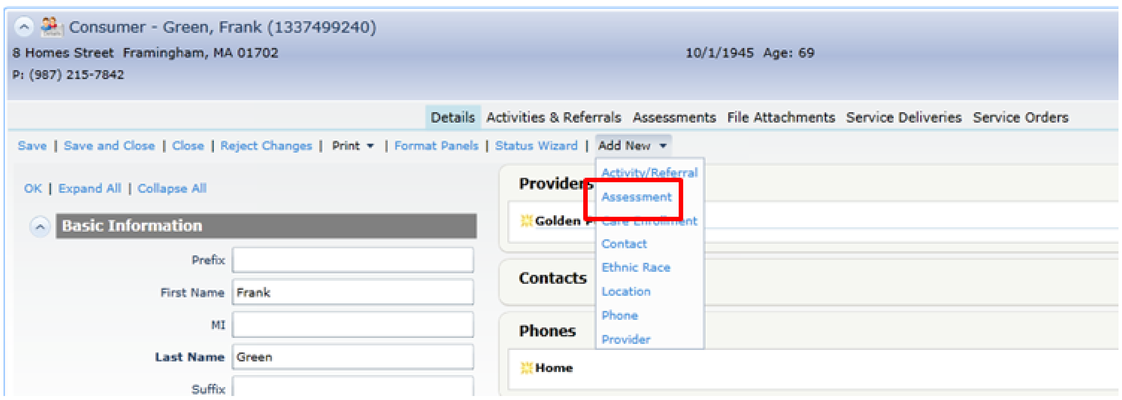
*Ensure that the Medicaid number is correct and fully verified before transmitting it to Coastline.

*It is the AFC/GAFC provider's responsibility to ensure that the consumer is MassHealth Standard, and NOT in a managed care plan (e.g., SCO, PACE, One Care.)

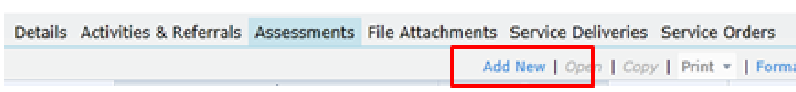
11. Check/add Social Security Number: If you are creating a new consumer and you did not enter it already, be sure to enter the Social Security Number (SSN) under *Basic Information* on the left side of the screen. If you do not add it now you will not be able to add it in this manner subsequently.

    SSN can be entered as part of the assessment completion process. [If you need to add the SSN after the assessment is more than 7 days old and is no longer editable, go to **Note 16.a: Regarding adding consumer Social Security Number or Medicaid number after** assessment completion for instructions.]

12. Click *Add New*, and from the dropdown selections choose *Assessment*.



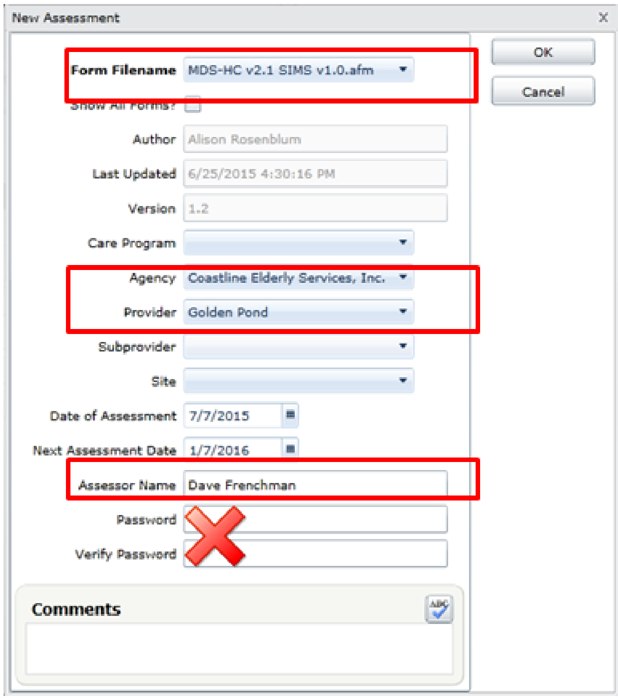
Alternately, the user can open the Assessments page and create a new Assessment from there:



13. In the New Assessment dialog box, select the following items from the dropdown menus as indicated below. Some of these items may be pre-filled, if you set your defaults in *My Settings*:

    - Assessment Form = *MDS-HC v2.1 SIMS v1.0.afm*
    - Agency = *Coastline Elderly Services, Inc.*
    - Provider = *your AGD Provider organization*
    - Assessor Name = *Person completing assessment*
    - **Do not create a password!**
    - Do not enter information in any other fields

    Click *OK* to open new assessment.

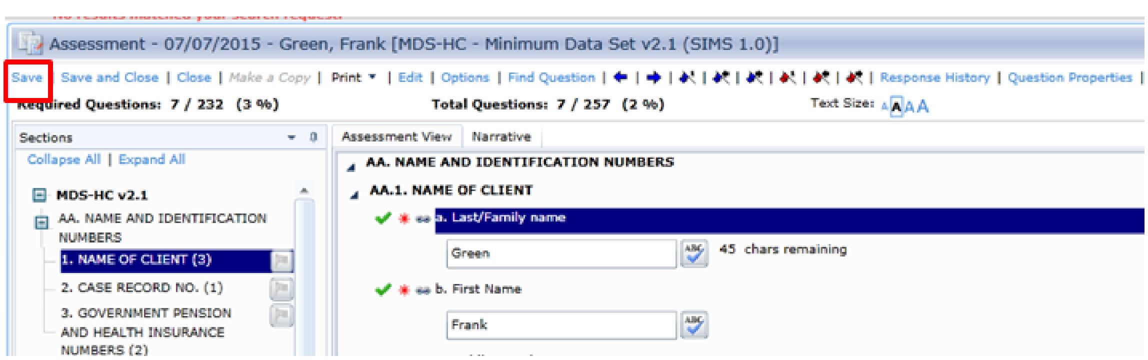


*Note to ASAPs: It is not necessary to select Coastline as the Agency when creating an Assessment.

14. Complete all fields in the assessment except for *RN Signature*, *RN Title*, and *type of screening* (AFC or GAFC.) ***These are the workflow trigger questions and should be answered only after the Clinician has validated all MDS data entry.*** Advance within the assessment using the section index at the left, by using the arrows or tab key on your keyboard. Click *Save* when you have finished.

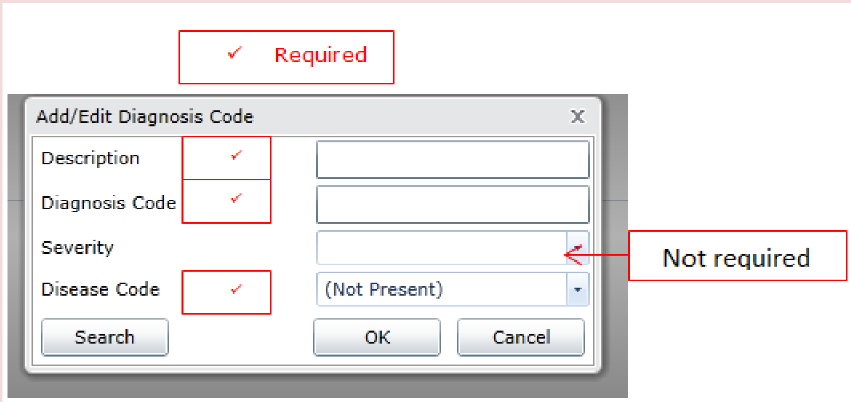
   * If you have not yet entered the Social Security Number for a new consumer, be sure to add it before you save the assessment. If you need to add it once your assessment is no longer editable, go to **Note 16.a: Regarding adding consumer Social Security Number or Medicaid number after** assessment completion for instructions.

   Go to the Harmony Portal page, *Application Support Resources*, and view the SAMS 3 User Guide for more detailed information on assessment settings and navigation.



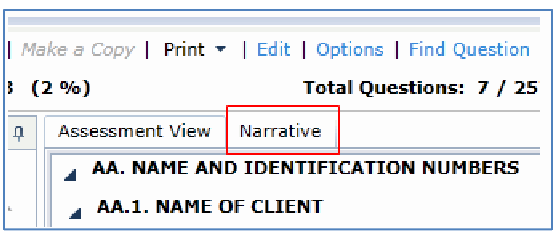
Note 14.a: Regarding Diagnosis Code data entry, Section J.2:

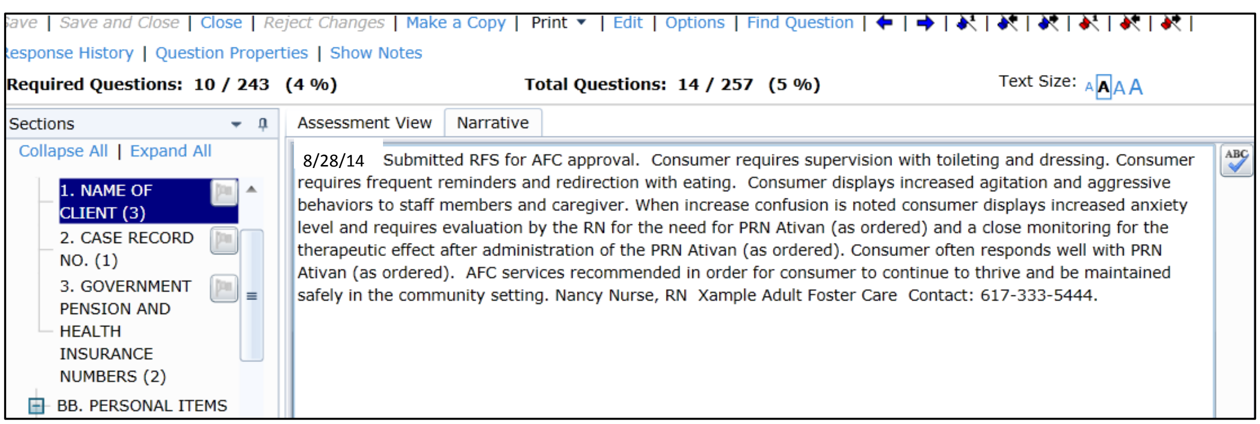
Completing the *Severity* response in the Add/Edit Diagnosis Code dialogue window is not required. All other fields should be entered.



15. Click the *Narrative* tab at the top of the assessment view screen, and add the assessment narrative. The contents should correspond with the RN's formal notes on the MDS-HC submission. It should include the name of RN, date, agency, and contact information. *Save* when complete.

    Note: once the assessment saved, you have seven calendar days to make any necessary edits before the assessment is permanently "locked."



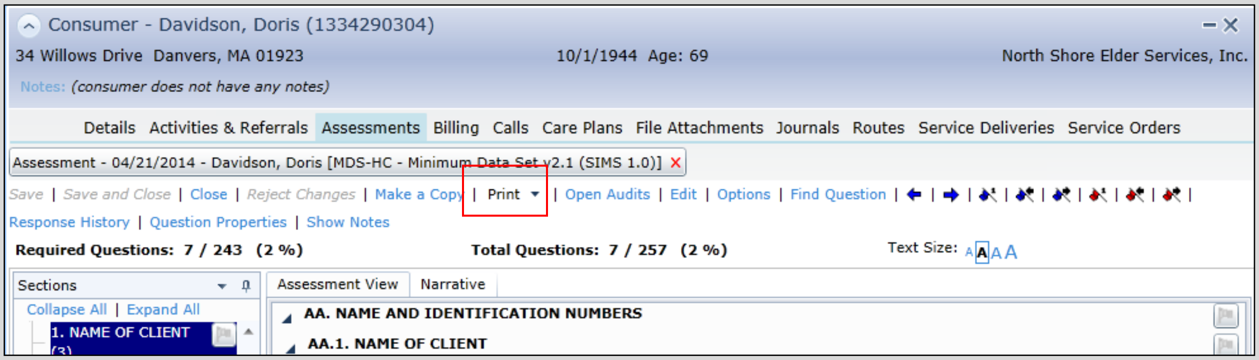


16. Review MDS-HC data entry for completeness and accuracy. Instead of scrolling through the assessment, it may be easier to view it as a PDF document- instructions below. ***The RN should carefully review the data entry before signing the assessment.***

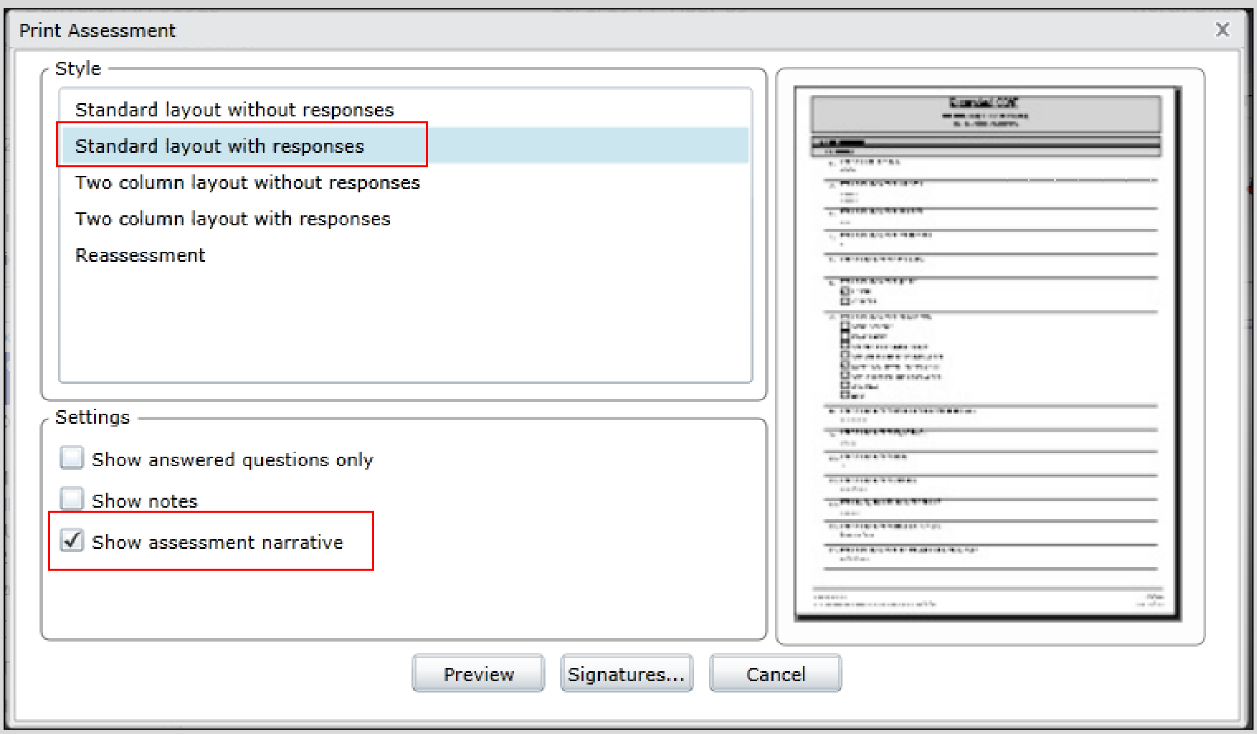
Tip: To View Assessment as a PDF Document:

Save Assessment if open, or reopen saved assessment.

Click *Print*



Select *Standard layout with responses*, and check the *Show assessment narrative* box. Click Preview, and validate the data entry for the assessment.



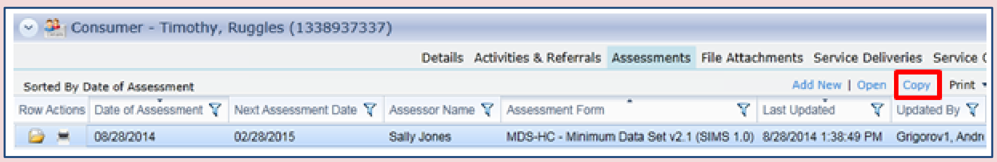
Note 16.a: Regarding adding consumer Social Security Number or Medicaid number after assessment completion

If you have not yet entered the Social Security Number or Medicaid number, you will be able to add it to the assessment as long as you are within seven days of its creation. Open the assessment, and add the SSN and/or Medicaid number to Section AA. 3. Upon saving the newly entered number(s), they will populate over to the SAMS consumer record. Keep in mind that saving the assessment a second time will cause the Workflow triggers (detailed in next section) to activate. Simply click *Clear All* on the workflow tab to delete these tasks; you do not need to do them again.

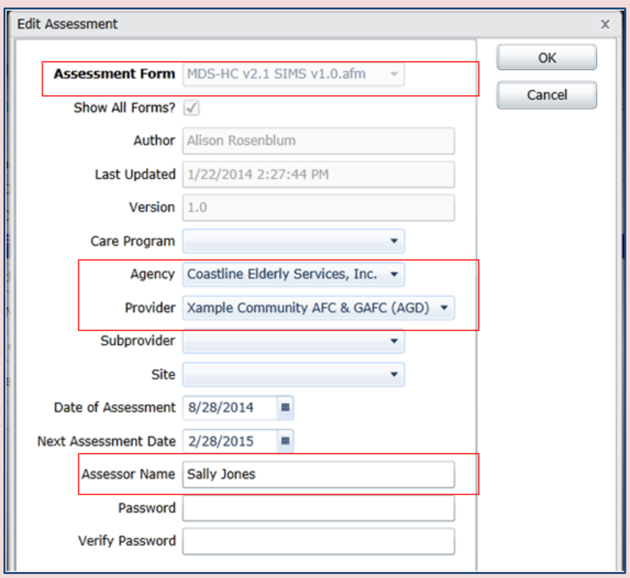
If you are past the seven days and the assessment has been "locked", you will need to follow the *Copy Assessment* procedure below in order to add the SSN and/or Medicaid number information.

Note 16.b: To "Copy Assessment" in Order to Add Data After Seven Days

1) In the Consumer's Assessment section, select the completed assessment by clicking on it once. Click *Copy.*

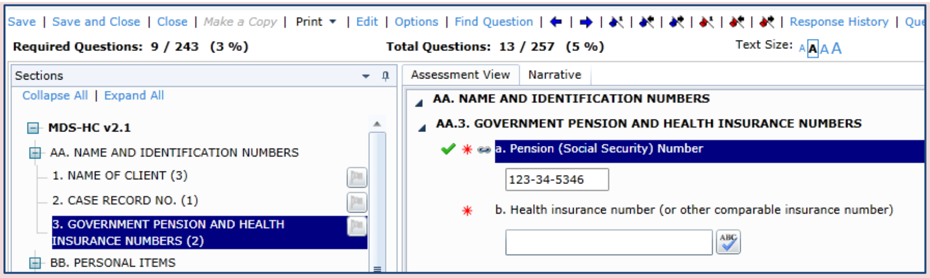


2) Complete the *Edit Assessment* dialog as you did in the initial assessment creation steps.



*Note to ASAPs: It is not necessary to select Coastline as the Agency when creating an Assessment.

3) Add the SSN to section AA. 3., and save assessment.



4) Re-saving the assessment will again trigger the workflow tasks (detailed in next section); simply ignore them, and click *Clear All* at the bottom of the Workflow tab.

Note 16.c: Regarding GAFC Screenings for Active SCO, PACE, or One Care Members

The GAFC provider should not submit any requests for GAFC screenings for active SCO, PACE, or One Care members to Coastline. SCOs, PACE programs, and One Care organizations are responsible for completing the GAFC screening process for the active member.

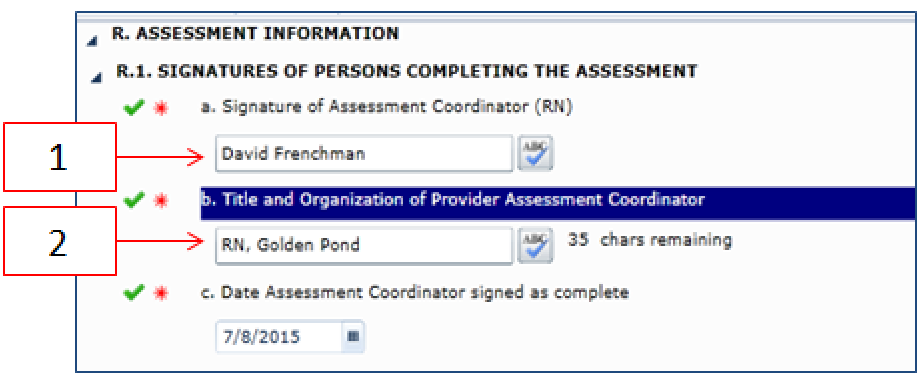
For ASAP GAFC providers, the GSSC (Geriatric Support Services Coordinator) should contact the SCO provider to complete the screening process.

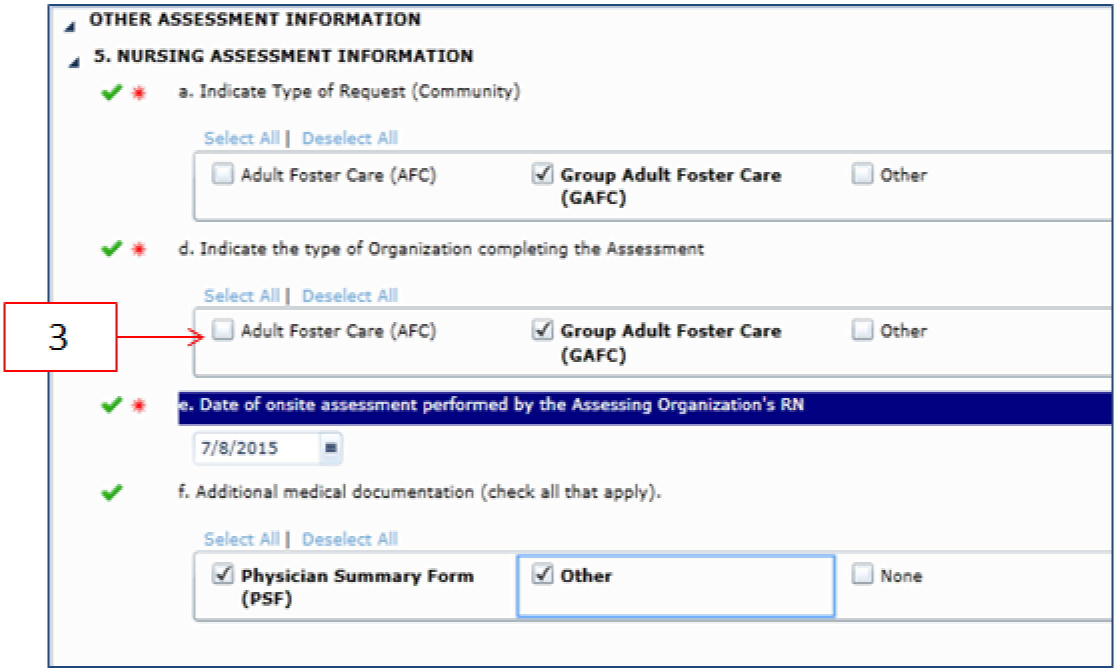
Workflow Triggers & Tasks

17. Once the information is entered and deemed accurate, enter the final pieces of information to complete the assessment:

All information is required, but these are the 3 specific responses that will trigger the *workflow*:

1. RN Signature (Section R. 1. a.)
2. Date Assessment Coordinator Signed as complete (Section R. 1. C.)
3. RN Title (Section R. 2. B.)





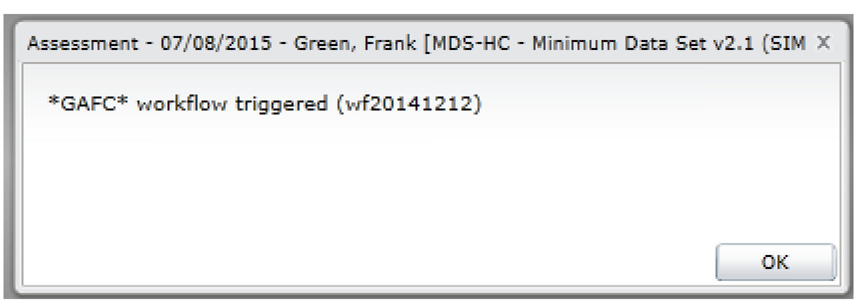
18. Save or [Save and Close] the assessment.

Completing these three data fields and saving the assessment triggers the creation of ***Workflow*** tasks *in* SAMS*. Workflows* provide a sequence of tasks to follow that will help you complete the remaining steps of the AGD submission process.

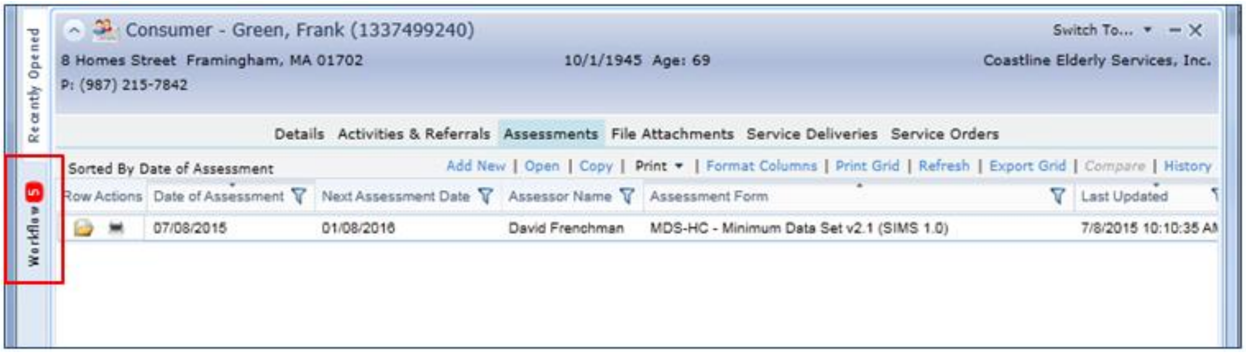
Workflow tasks follow the user who initially creates them, not the consumer or organization. This may be important if more than one user at your organization is involved in the process.

Workflows are intended to guide a user in creation of all required data elements in the proper order. The tasks may be created in any order, and by any user – however, the Activity & Referral should always be the final step.

A message that the workflow has been activated will appear. Click *OK* to close.



You will now see a number appear next to *Workflows* on the side menu.



19. Click or hover your cursor on the *Workflow* side tab. This will reveal a series of tasks. Note that the number of tasks will vary between AFC and GAFC submissions.

    In this example of a GAFC submission, two documents (that you previously scanned to your computer) need to be uploaded and attached, a Contact must be created in SAMS for the RFS Responsible Party/Next of Kin, and a CAE Care Enrollment and Activity & Referral will be created.

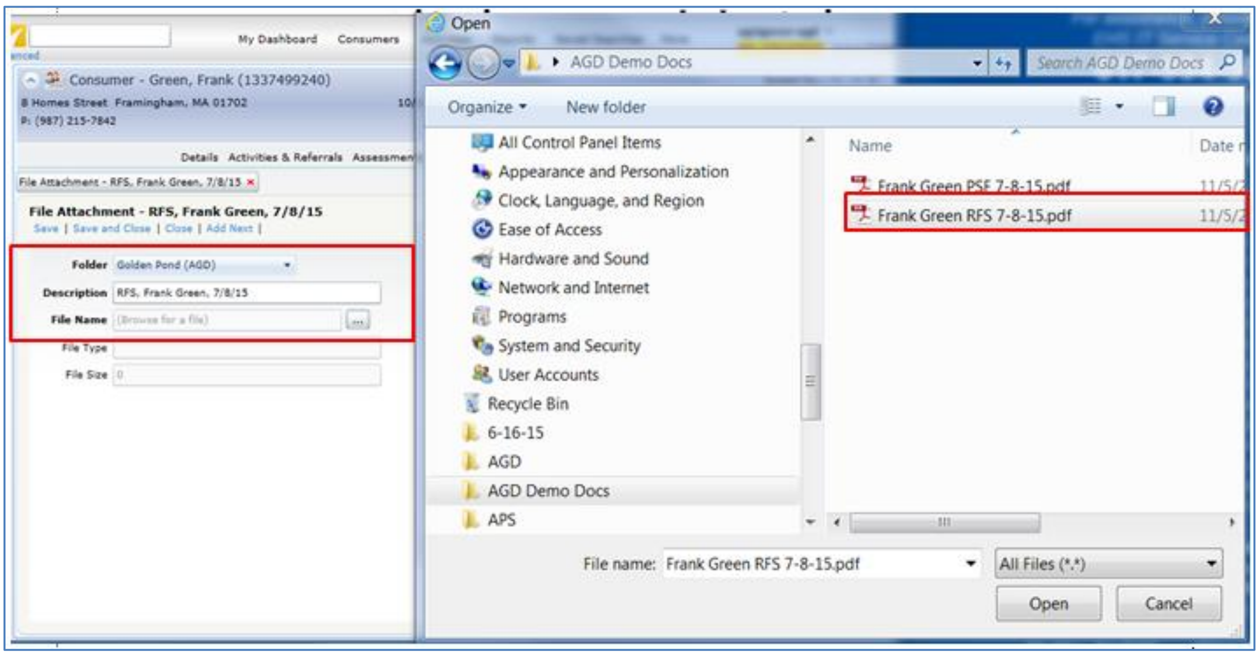
    [For AFC Initial Determinations only, you will be prompted to also add the AFC Cover Letter]

    Click the *pin* icon in the upper right corner of the workflow panel to keep the tasks visible while you perform each one.

20. Click on the first task: *Attach Request for Services.* Note that the status of the task is *Not Started*.

File Attachments

21. This opens the SAMS *Add File Attachment* window. In the *Folder* field, select your organization. Enter a name for the document (in the format shown below), and locate the file on your computer by clicking the Browse  button. Click Open to upload the file to SAMS.



22. *Save and Close*. Note that the number of *Workflow* tasks on the bottom tab has changed to 4, and your saved file attachment is now listed on the File Attachment page of the consumer record:

Note 22.a: Regarding Additional Clinical / Medical Documentation:

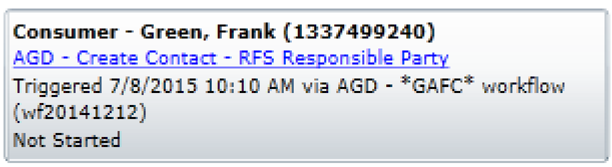
Documents supplementing the Physician Summary Form, on formal letterhead and with the physician's signature or initials, should be included along with the PSF as part of the same file attachment.

If there are other additional relevant clinical materials available the provider should follow the same file attachment process. The naming convention should mirror other attachments, i.e. *Document Type, Consumer Name, and Date*.

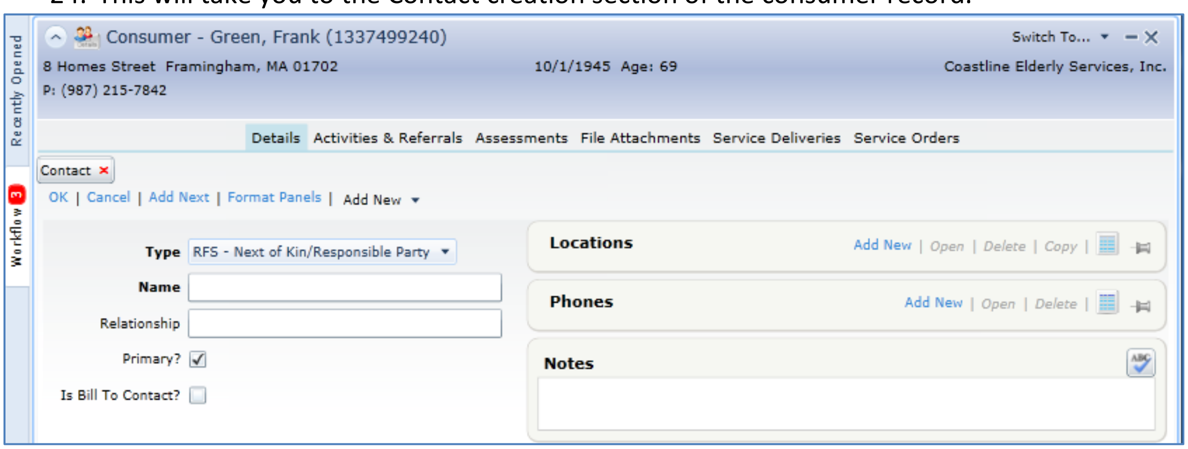
Adding Contact Information

The next step requires you to create a new ***Contact*** in SAMS from the Next of Kin/Responsible Party information on the Request for Services form.

23. Start by clicking the Workflow task AGD – Create Contact – RFS Responsible Party task.

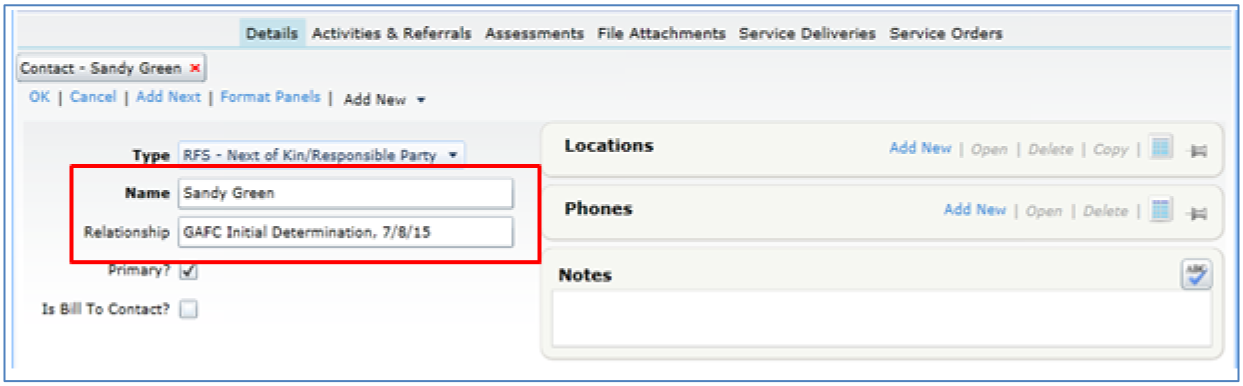


24. This will take you to the Contact creation section of the consumer record.



You will now enter the Name, Address (Location), and Phone number for the Next of Kin/Responsible Party Contact as it is written on the Request for Services form. If there is no information for this contact on the RFS, you will still enter a contact (using "N/A" for the name.)

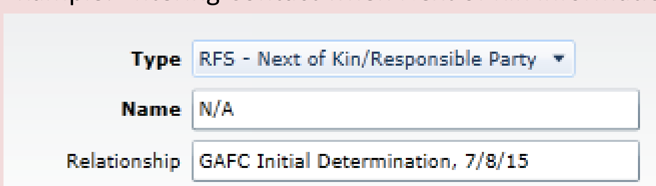
25. Enter the contact name. ***In the Relationship field, enter the type of screening request submitted, and the date, as shown below.***



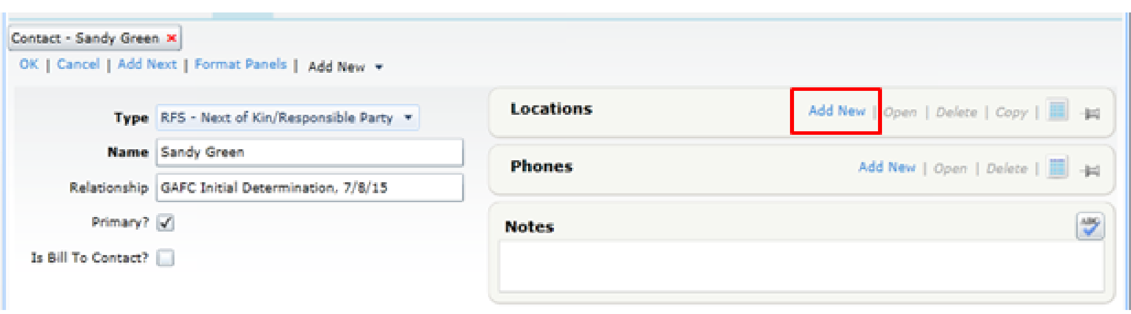
Note 25.a: Regarding Contacts

- Whenever you add or update a Contact, the screening request type and date should be added to the Relationship field.
- If you find that the person already exists as a contact for this consumer, edit the contact with any updated information. Open the contact by clicking the folder icon  next to it in the Contacts panel on the Consumer details screen. Enter the type of screening request submitted and the date in the relationship field as shown above.
- *If there is no Next of Kin/Responsible Party contact information on the RFS form, enter "N/A" as the contact name, and the type of screening request submitted and the date in the relationship field as shown below. You do not need to add any information to the Locations or Phones sections*.

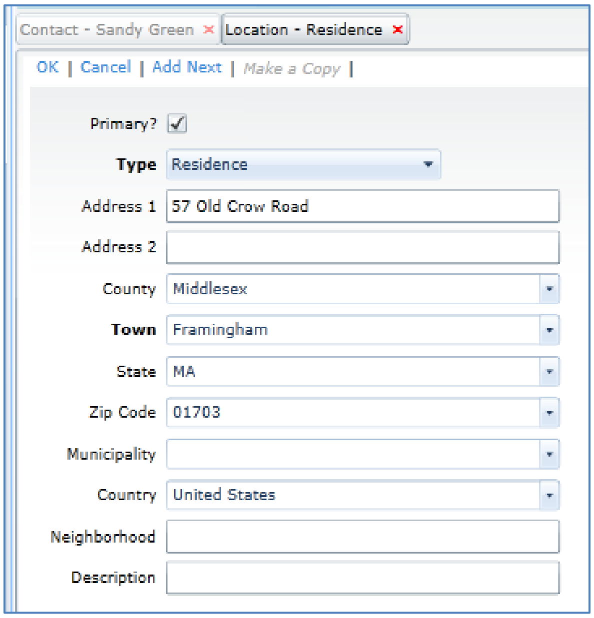
Example: Entering Contact when Next of Kin information is not present on RFS form:



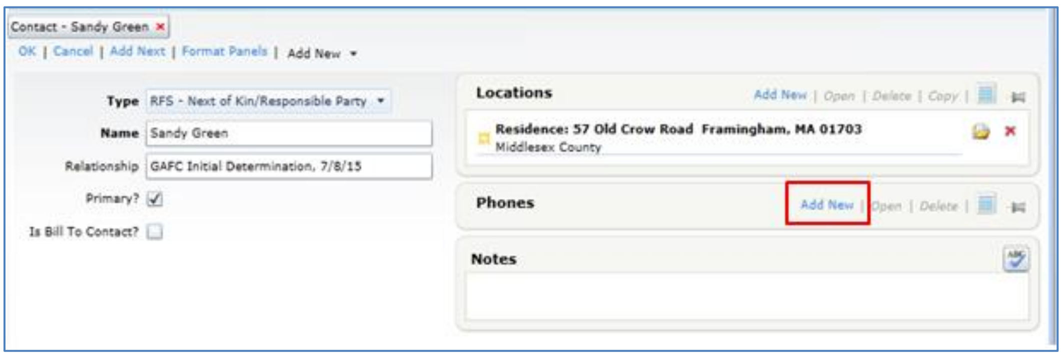
26. Add the contact's *Location* (Address) by clicking on *Add New* on the *Locations* panel.



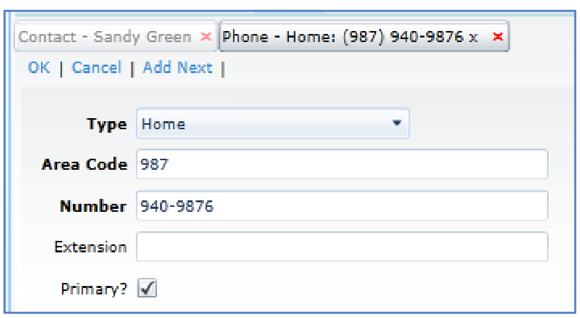
27. Enter address information as indicated on the RFS form. Click *OK*.



28. Add the contact's phone number by clicking *Add New* on the *Phones* panel.

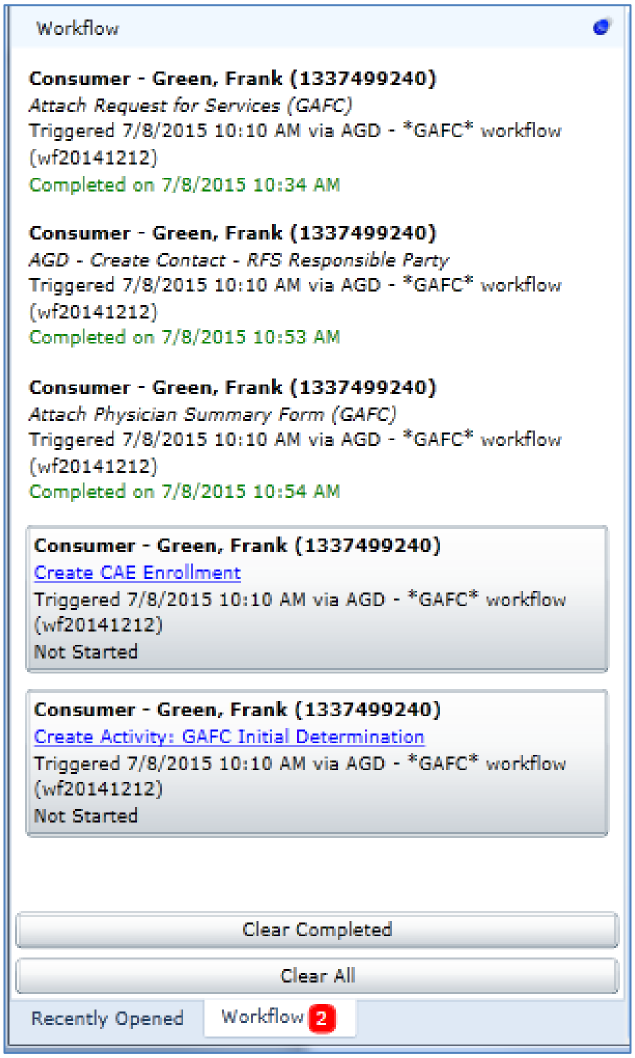


29. Enter the area code and number. Click *OK*.



30. Click on the next file attachment task on the Workflow side tab, go to the file attachment section of the consumer record, locate and upload the indicated document.

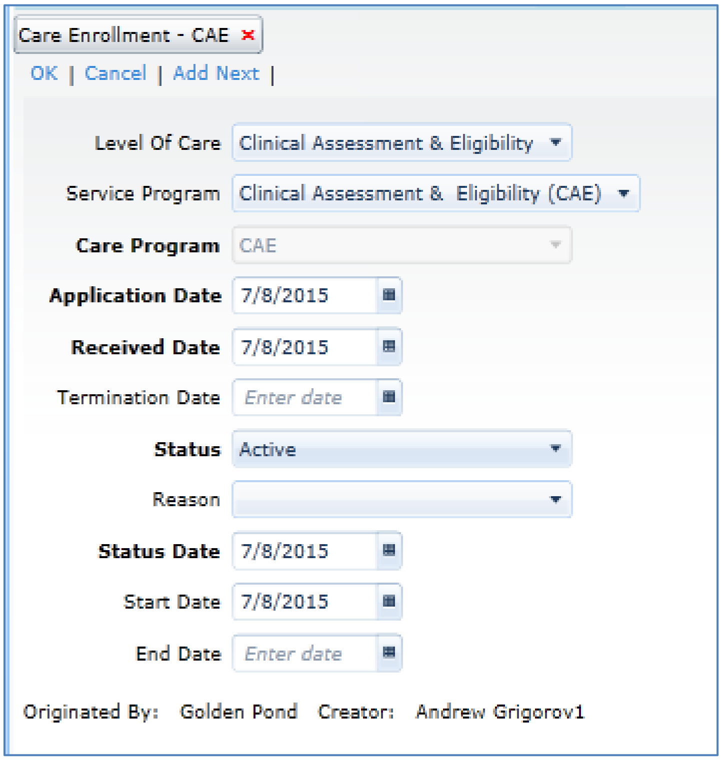
    In this example of a GAFC submission, the *Physician Summary Form*, and the *Request for Services* form. [Note that the *AFC Cover Letter* is only required for AFC submissions; GAFC providers should not include it.] Once completed, the *File Attachment* list shows the newly uploaded files, and the number of *Workflow* tasks decreases correspondingly.



Add Enrollment

31. From the *Workflow* task list, select *AGD - Create CAE Enrollment.*

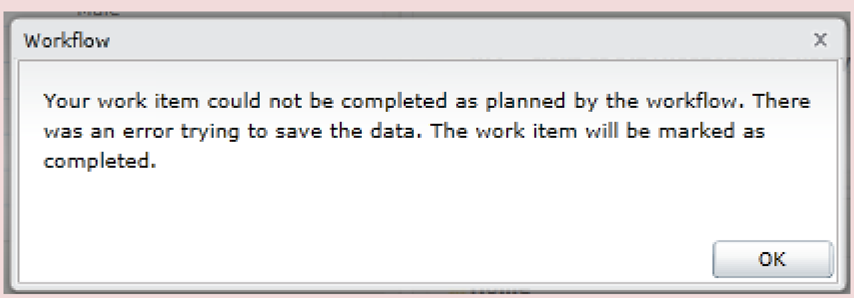
32. If the information has not been pre-filled, enter the current date into the Application Date, Received Date, Status Date and Start Date fields (leave the End Date field blank). Note that for newly created consumers, the current date will default into all the necessary date fields, for existing consumers you may need to edit the dates. The end result is that there should be and active CAE enrollment effective as of submission date. Click *OK*.



Note 32.a: What to do if Workflow message is received when creating enrollment

If you are working on a pre-existing consumer and attempt to add a CAE Care Enrollment using your workflow tasks, you may receive an informational message. The message, shown below, indicates that a CAE Care Enrollment already exists in SAMS for the consumer you are working with. In this case you would simply click OK to the message, and ignore that task.

The most important point is that an active CAE enrollment exists; it does not matter who created it.



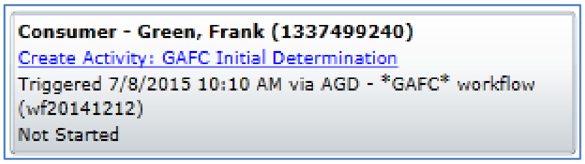
Add Activity

Activities are used as the main method of communication between GAFC/AFC providers and Coastline for the AGD process. AGD providers should be frequently checking their dashboards for the appearance of new Activities. This is replacing a phone call based system.

There should be one and only one Activity created per submission. All communication occurs through this same Activity – either by a status change, or an additional comment.

*Note that providers should only be entering a status of *Not Started* for an Activity – all other statuses are handled by Coastline.

33. From the *Workflow* task list, select *AGD - Create *GAFC* Activity & Referral*

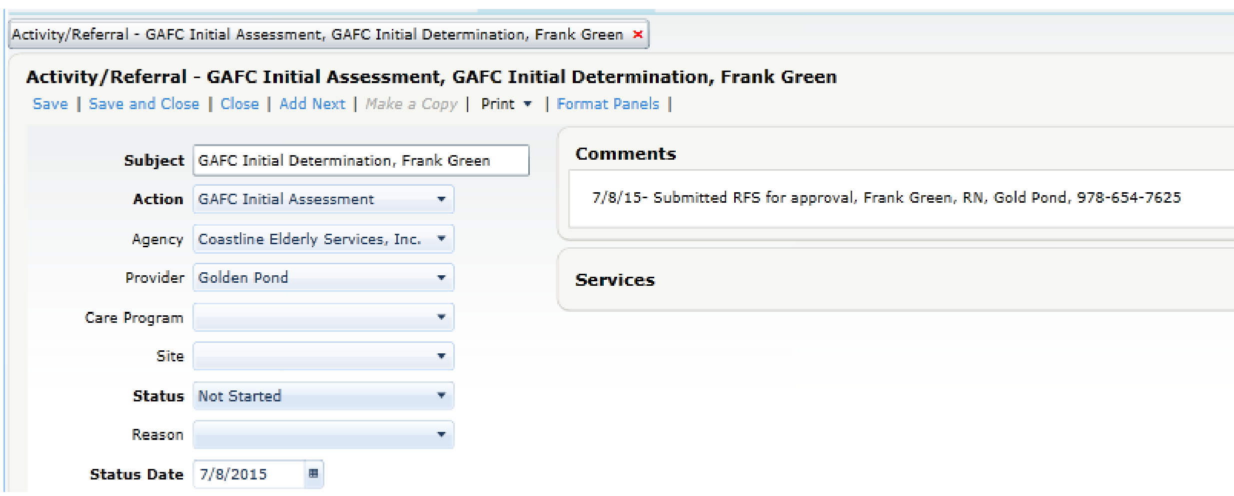


34. Enter the Activity details as shown below. Enter a *Comment* with the contents as shown.

Do not add any additional information (Care Program, Site, etc.)

> *Note to ASAP AGD users: Even if your practice is to always select your own ASAP as the Agency for an Activity, it is necessary to select *Coastline* as the Agency at this step in the submission process.

[If there is a Medicaid number discrepancy, add a note in the Activity Comments field so that Coastline is aware of it.]



35. Click *Save and Close.* This is the final of the Workflow tasks, and it effectively hands it off to Coastline, to execute the next phase. The creation date of the Activity & Referral marks the point where the AGD Provider believes that their application materials are complete. This is why it is important that the Activity & Referral creation is the last step in the submission.

    Coastline will notify the AGD Provider via the Activity & Referral if the materials are found to be incomplete. It is important to frequently check your dashboard widgets, or run a SAMS report, to receive this information. You can use this guide to re-do specific tasks as needed.

View Determination Information

By viewing the SAMS Dashboard Activity & Referral widgets, the AGD Provider can learn of Coastline's activity related to this determination.

The screening is considered to be complete only when every task (clinical and administrative) is done. Even though Coastline's RN may have completed the initial review and made a note in the Activity and Referral, the screening is not complete until the Notice of Eligibility letter is uploaded into file attachment and the status is changed to complete.

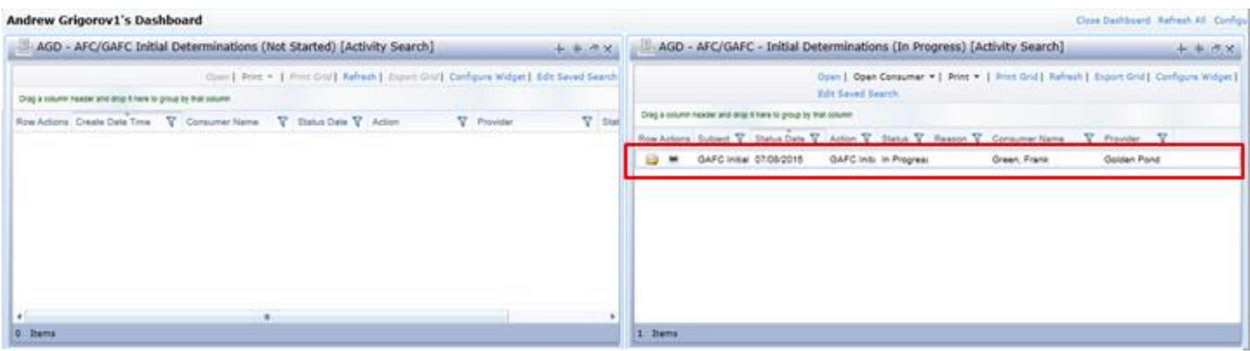
Please do not contact AGD.Support@massmail.state.ma.us with status inquiries until 21 days after the initial submission of determination materials (i.e. creation of the initial Activity with status *Not Started*.)

Using Dashboard Activity Widgets

When Coastline first opens the Activity & Referral related to your submission, they will change the status of the Activity from *Not Started* to *In Progress*. This will indicate that they have received the information and have started reviewing your materials.

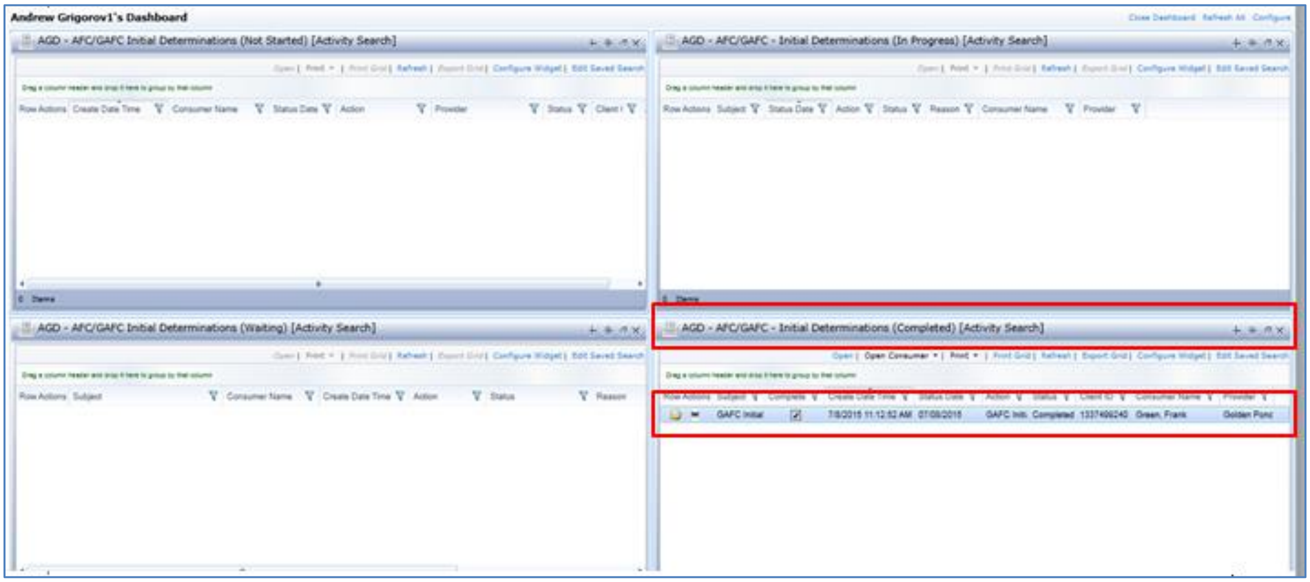
One of the Saved Search Widgets on your Dashboard should be set to track Activities of various statuses, including *In Progress*. (See previous section *Using Your Dashboard* for more details.)

As shown below, the Activity is now appearing on the Provider user Dashboard in the "IN PROGRESS" Widget.



By viewing another Dashboard Widget, this one tracking Activities & Referrals with a status of *Complete*, you can learn of Coastline's final determination decision:

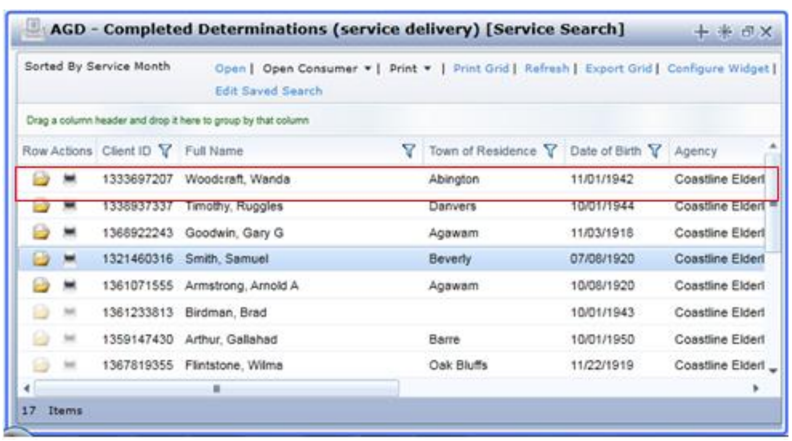
In the example below, the Provider user can see that Coastline has changed the status of the Activity to *Completed*, thereby moving it from the *AGD In Progress Widget* to the *All Activities with Status = Completed* Widget.



Using Dashboard Service Delivery Widget

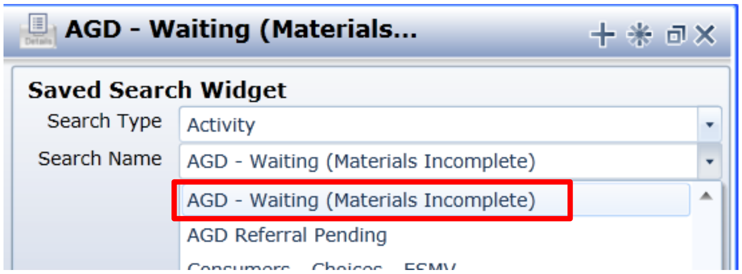
The Provider can also use the *AGD Completed Determinations (service delivery)* Widget as another way to be notified of a completed Determination.

The example below shows the Provider Dashboard screen after Coastline has created the service delivery, which marks a completed Determination process.

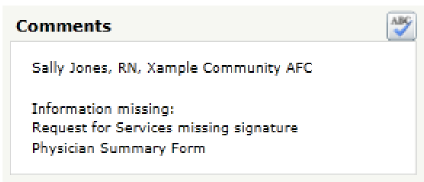


Notification of Incomplete Submission

If Coastline finds that the application materials are incomplete and/or not clinically sufficient, you will be notified via a specific Activity status: *Waiting*. This Activity status type is available as a Widget search selection, named *AGD – Waiting (Materials Incomplete)*



The missing information is listed within the *Comments* section of the opened Activity.



Complete the request to provide missing materials. Workflows will not be triggered for these tasks, it will be necessary to go to the proper section of the consumer record.

Modify the SAMS data as needed:

- Add replacement document scan(s) – note *Replacement* in subject line.
- Update assessment data – if MDS is still editable, record changes in Narrative section.
- Copy assessment if MDS is locked for editing (7 days after creation.)

In the example above, the user would need to gather the materials, sign and scan the Request for Services document, and upload the files to the consumer record from the *File Attachment* section.

*Once the corrected materials are attached and the application is complete, change the status of the Activity from *Waiting* to *Not Started*. This will inform Coastline that you have completed the request for missing materials.

AGD Point-person

Welcome AGD Point-person!

Point-person responsibilities & expectations

The AGD Point-person is primary point-of-contact for all project communications between your organization and the ELD/ OLTSS Project Team. You are expected to disseminate information to your organization's end-users, and to seek clarification from the Project Team whenever necessary. Point-people are the designated voice of an organization; communicating with the AGD Project Team via standard protocols that maintain HIPAA-compliant information security, for all users in the organization. Organizations may wish to identify two (2) Point-people for continuity during vacations, or at other locations.

The point-person should **thoroughly understand your organization's assessment process** for AFC or GAFC applicants: from initial referral, collection of assessment documentation (Physician Summary

Form, Request For Services, etc.), RN's onsite assessment, MDS-HC data records, and post-submission communication with Coastline Elder Services.

The Point-person must communicate with information security with regard to Personal Health Information (PHI) and Personally Identifiable Information (PII). **Specifically, all Point-people must register their email address with the Commonwealth of Massachusetts' Secure Email Delivery System**, and use that system when communicating with AGD Support on any topic.

The Point-person is responsible for user account access administration for the organization, identifying colleagues who are potential SIMS users because of their participation in the determinations process, and communicating this information to the Project Team. Point-people will ensure that end-users set up their User Accounts correctly and are able to manage their own password resets and security questions. "Points" are also responsible for ensuring that User Accounts are terminated when necessary, and other aspects of maintaining Administrative Security to Protected Health Information (PHI) and HIPAA compliance.

The AGD Point-person trains end-users within their own organization, after train-the-trainer sessions with the Project Team. The Project Team at OLTSS/ELD & Harmony will work to ensure that end-user training materials are effective, appropriate, clear and usable, and readily available. Point-people are expected to raise issues and identify gaps or improvements in training and other implementation materials.

Point-people are the first line of user support within their organization: to help end-users resolve password issues; perform basic troubleshooting; and incidental training to enable successful use of SAMS. If a technical issue with the application emerges, the Point-person will gather details and communicate with AGD.Support staff at ELD/OLTSS.

The role of the AGD Point-person will continue after implementation ends and the processing becomes routine, though personnel may change.

Communications with AGD Support

All Providers' communications with AGD Support regarding AFC/GAFC Determinations are intended to be phone-call -free. AGD Support staff are a decentralized team spanning multiple organizations: MassHealth Office of Long-term Services & Supports (OLTSS), Elder Affairs IT, & Harmony.

- Please avoid use of telephone or voicemail except by prior arrangement with a specific individual.

Secure email for *all* AGD Support communications

To reduce risk of an information breach, all communications between an AGD provider and the AGD Support team are assumed to contain Protected Health Information (PHI) or Personally Identifiable Information (PII).

Therefore, all email to AGD Support must be encrypted using the Commonwealth of Massachusetts Secure Email Portal. **Note**: AGD Support staff may reject, without reading, incoming messages that do not use the Commonwealth's secure protocols.

Registration of Point-person's Email Address for secure e-mail

This task is a requirement for all AGD Point-persons. This is a quick task, once you receive an invitation email. See the Appendix on **How to Register with the Mass Secure Email Portal** (below).

A more detailed procedure is posted to the AGD Support blog, with screenshots (read How to Register with the Mass Secure Email Portal) .

Sending a secure email (new email chain)

All secure email you initiate to **AGD Support** must be composed at the SecureMail portal. Login at https://ppsecuremail.state.ma.us/encrypt

More detailed instructions are available at http://agd-support.800ageinfo.com/2015/03/how-to-create-a-secure-email.html, or in the Appendix below.

Support

Support Overview

Each AGD Provider must have an assigned *AGD Point Person*, who is the primary contact for the AGD process and responsible for interaction with support resources. The system is intended to be "phone call free": all communications should occur either through email to agd.support@massmail.state.ma.us, or by using the status and/or comments field of the Activity in SAMS.

Support issues can be divided into 4 categories:

Secure email must be used in all cases.

1. **User Account Access / User Management** - Password problems & resets, access issues
2. **Application Issues**- Technical software support, when the Harmony portal or SAMS do not function as expected.
3. **Determination Support**- Issues relating to the contents of determination materials for a specific consumer, exchange of information between the AFC/GAFC provider and Coastline Elderly Service
4. **Training & Training Materials**: Issues & questions related to training materials made available by AGD Support and Harmony.

These 4 general support areas are explained in more detail in the following sections. If issues cannot be addressed by the user independently, the proper contact for support is identified at the end of each category subsection.

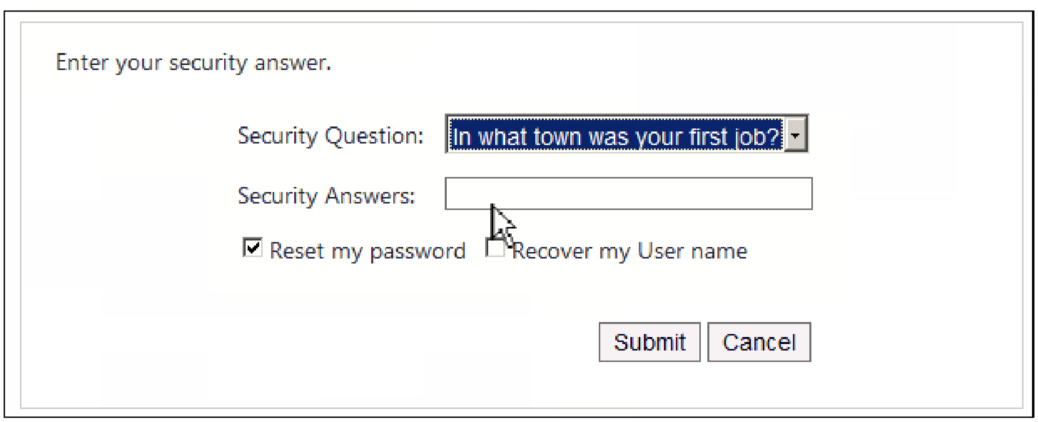
User Account Access / User Management

Password Problems & Resets

Any time a user has forgotten their User Name or Password they can retrieve it automatically, without having to contact their administrator, simply by clicking on the **Forgot Password** link at the main login screen.

Once the **Forgot Password** link has been pressed, the user will be prompted to enter the Email address that is associated to the User Name.
The user can enter their Email Address and press Verify Account. At this point the Harmony Portal will confirm that the Email address is indeed associated to a valid account.

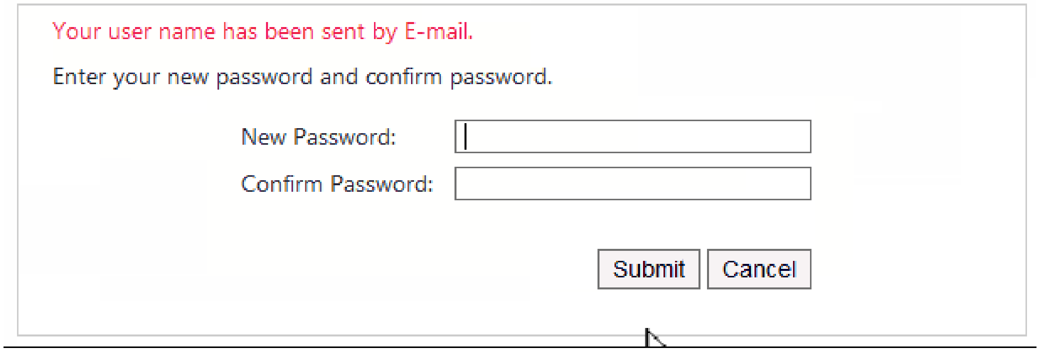
If the validation is successful, the user will be presented with their security questions. Note that the security answers are not case sensitive and must match exactly.



From this screen, the user needs to simply enter the response to their security question and choose among two options:

Reset My Password: Will immediately bring the user to the “Create New Password Screen”.

Recover my User Name: Will send an automated Email to the user’s Email address with the User Name information.



***If your security questions have not yet been answered and you are unable to reset your password independently, your AGD Point Person will need to contact AGD Support at agd.support@massmail.state.ma.us.**

Activating / Deactivating Users

Non- ASAP Providers:

For new user requests, and the deactivation of existing users, the *AGD Point Person* should send an email to the support inbox (agd.support@massmail.state.ma.us) with the following information:

- Type of request (new user or deactivation),
- User full name
- User email address
- Indicate if the new user will be a Point-person (secure email registration to follow)

ASAP Providers:

Designated Access Administrators at ASAP providers should follow their standard protocol for requesting an additional user, or granting an existing user AGD privileges.

Application Issues

System Requirements & Browser Configuration for Operating SAMS

If you encounter technical problems with SAMS, please first ensure that your computer meets the system requirements detailed in the *Harmony Computer Configuration Requirements – May -SAMS,* available on the Harmony Portal page under *Application Support Resources.* This document also contains browser configuration details.

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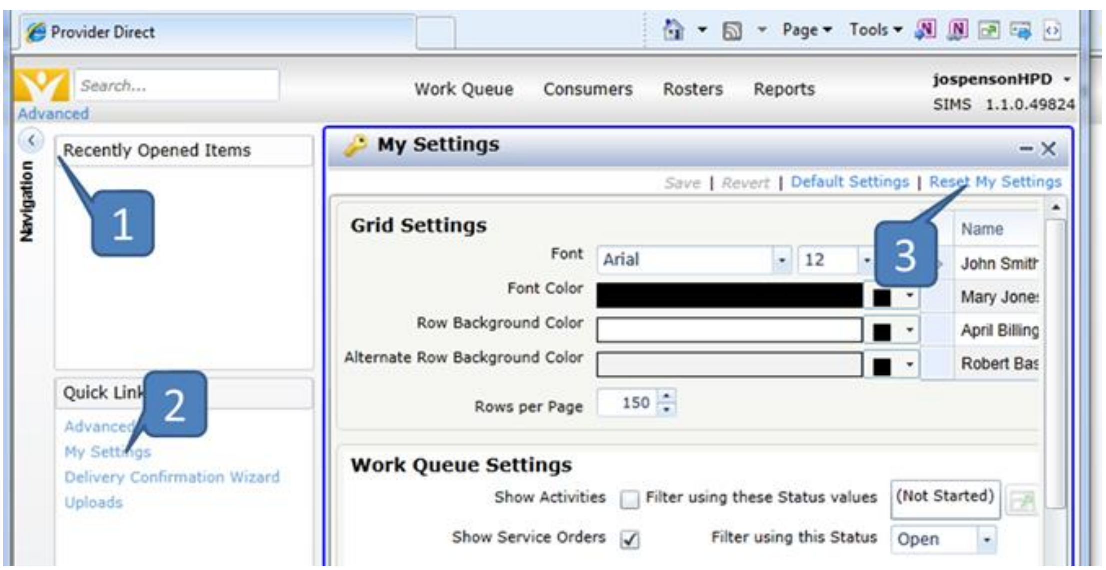
Reset Application Resources

Before reporting most technical issues, AGD Point Persons should ensure that users have reset application resources.

On occasion, a user may be directed to "reset application resources" in SAMS to address a particular issue. It is not always a necessary process, but it may help in a situation after other potential causes of a problem have been ruled out.

Step 1: Open My Settings

1. Open the navigation pane
2. Click **My Settings** (under Quick Links)
3. Click **Reset My Settings**

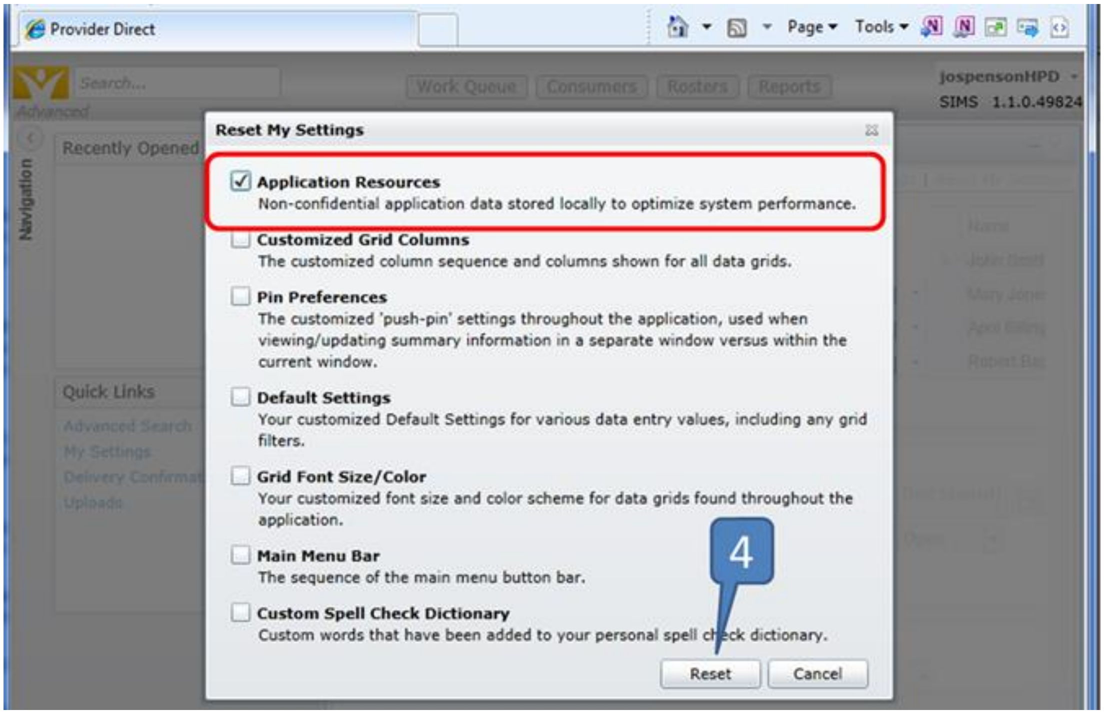


Step 2: Reset My Settings

After you click Reset My Settings, the screen will grey out and the Reset My Settings options will display.

Make sure that Application Resources is checked. This refers to Silverlight.

1. Click the [**Reset**] button.



Reporting an Issue

***If your application issues have not yet been resolved, you will need to contact AGD Support at agd.support@massmail.state.ma.us.**

To best help you resolve the issue, please first confirm that system and browser configuration requirements (shown in previous subsections) are adequate.

Once this is confirmed, send an email to the support email address above, being sure to include your organization name in the subject line. Example email subject line: ***AGD – Beacon AFC – Dashboard not showing as expected.*** Also include this key information:

- **Date/Time that issue occurred**
- **AGD User Name**
- **Indicate where the user was working at the time the issue occurred - what screen was visible?**
  - List the exact steps to get there and order in which they were taken.
- **Provide a brief description of what the user attempting to do.**
  - Example: Complete assessment, attach file, etc.
- **Consumer information**: Include consumer information if relevant, using the ***consumer's initials and the SAMS identification number only***. Be sure to avoid sending any confidential consumer information in an email message, adhering to HIPAA guidelines.

It is often helpful to include a ***screenshot*** of the issue as well, instructions below:

- While viewing the SAMS screen where the issue or error occurred, press the [**PrintScrn**] key on your keyboard to copy the screen display to the clipboard. *(This key is usually located in the* *upper right corner of the key board).* If your email application supports only plain text, you may wish to create a Word document or Power Point to hold screenshots. These documents should be attached to your email.

- Within the email place the error message screen shot at the bottom by clicking on **Edit** button on the top toolbar, then click **Paste** (or hold down **Ctrl** and **V** button on your keyboard).

Determination Support

For issues relating to the individual AFC/GAFC consumers being referred to Coastline, and questions about the content of materials being reviewed in SAMS, please securely email agd.support@massmail.state.ma.us. Indicate your organization and issue in the email subject line.

Training Materials

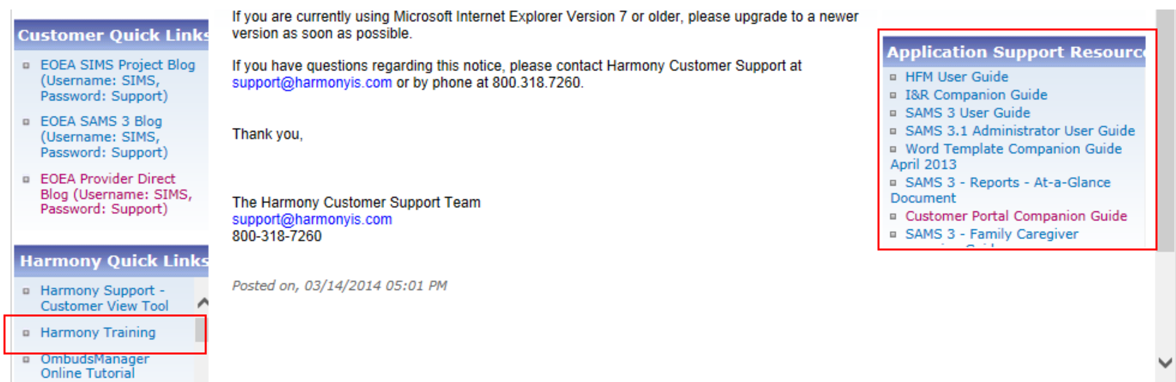
AGD Point-persons are expected to train their organization's users in the use of SAMS for AFC/GAFC Determinations processing, using materials provided by Harmony (portal & SAMS) and by AGD Support (specifics related to the determinations process & clinical materials presented to Coastline).

Harmony Portal

There are a variety of training and support materials available on the Harmony Portal.

Under *Application Support Resources* you will find user guides and other helpful documentation.

Under *Harmony Quick Links / Harmony Training*, basic SAMS training tutorials are also available.



AGD Website

Visit the AGD Support website for the latest information and up-to-date documentation.

URL: http://agd-support.800ageinfo.com

The most recent version of this User Guide will always be available on this website – click to go to this User Guide's permanent download page.

Direct link to AGD User Guide for Providers: http://agd-support.800ageinfo.com/user-guide

AGD

Appendix

Document History

Date	Version	Description	By
May 6, 2019	Version 1.6.6	Updated with change in secure email portal URL	AG
July 9, 2015	Version 1.6.5	Updated to show new dashboard configuration steps	AG
July 8, 2015	Version 1.6.4	Multiple udpates & minor additions, new screenshots for process walk through	AG
May 15, 2015	Version 1.6.3	Added notes clarifying practice for ASAP AGD users and agency/provider tags	AG
April 14, 2015	Version 1.6.2	Added: Note regarding what to do if SSN conflict when creating consumer	AG
March 30, 2015	Version 1.6	Role of AGD Point-person updated; Appendix on Secure Email added , registration & communications using Commonwealth of Massachusetts' Secure Email Delivery System.	JAO
February 2, 2015	Version 1.5.4	Added “SCO” Instruction	AG
December 12, 2014	Version 1.5.3	Workflow enhancement revisions added	AG
October 29, 2014	Version 1.5.2	Minor edits per Jim O.	AG
October 9, 2014	Version 1.5.1	Minor edit – wording to Contact addition section	AG
October 6, 2014	Version 1.5	Contact addition section added, new process screenshots	AG
September 24, 2014	Version 1.4	Added clarifications re: SSN, copy assessment instructions, other minor changes	AG
September 8, 2014	Version 1.3	Further minor edits per P. Gardner	AG
August 29, 2014	Version 1.2	Screenshots replaced for step by step process, minor text revisions.	AG
August 1, 2014	Version 1.1	Revised File Attachment Instructions	AG
June 17, 2014	Version 1.0	First public release	AG

Secure Email: Registering With & Using the SecureMail portal

Secure Email uses digital encryption for added security over ordinary email, validating both senders and recipients against known indviduals. There are many services that provide email encryption functionality; the Massachusetts standard tool is known as SecureMail.

> The SecureMail application is used throughout MassHealth & the Commonwealth of Massachusetts. You may hear people refer to this as SFED, Secure Email, or encrypted email.

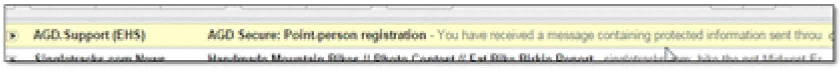
All AGD Point-persons are expected to use SecureMail for all email exchanges with the AGD Support team. Before sending an encrypted email, a user external to MassHealth must be registered with the service.

Registration is a quick, one-time process for each email account. Many users who are Points for an AGD providers will have already registered, because of previous correspondence with MassHealth personnel.

How to Register with the Mass Secure Email Portal

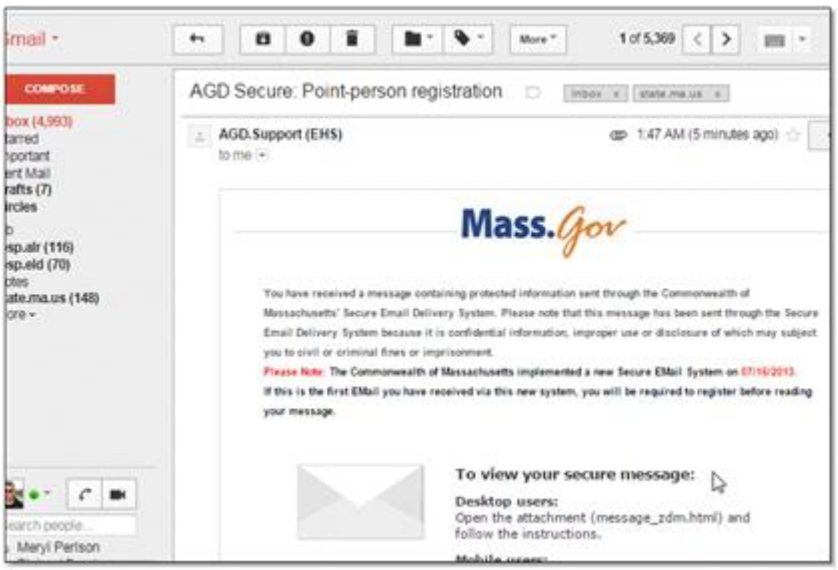
First, make sure that AGD Support team is aware that your organization needs to identify a new Point-person. If necessary, notify the AGD Support team that of a new AGD Point-person via email.

A prospective AGD Point-person will receive an email from AGD.Support@massmail.state.ma.us, with subject line "**AGD Secure: Point-person registration**" or similar.



Open this email.

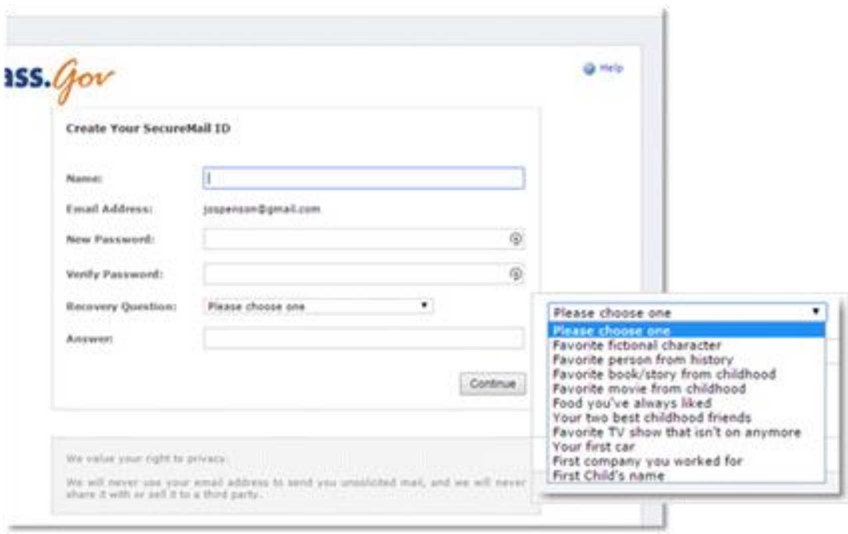
You can think about this as the envelope for the message. The "envelope" is not itself a secure message, and contains no Protected Information. Follow the instructions to view your secure message. Click to open the attachment.



The attachment opens. Click the [**Read Message**] button.

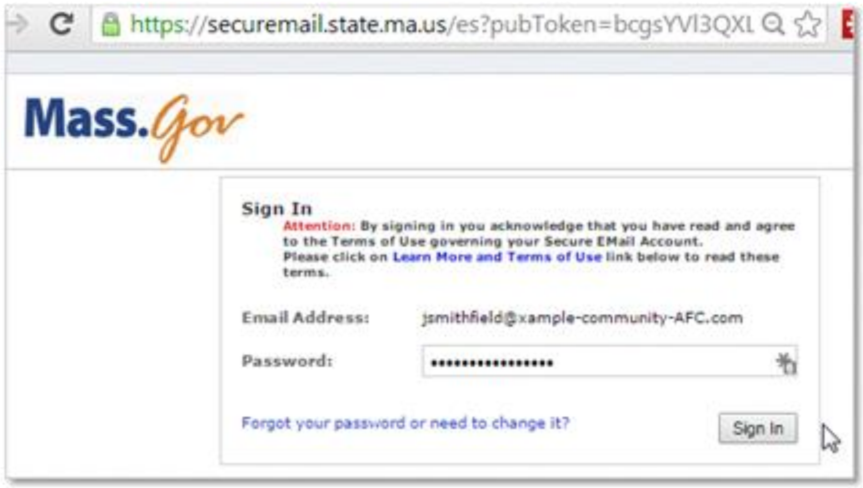
A secure website opens in your web browser.

If your email address is not on file with the Massachusetts Secure Email Delivery System, you will be prompted to create your SecureMail ID. Set a password, and set your password recovery question & answer. Click [**Continue**].



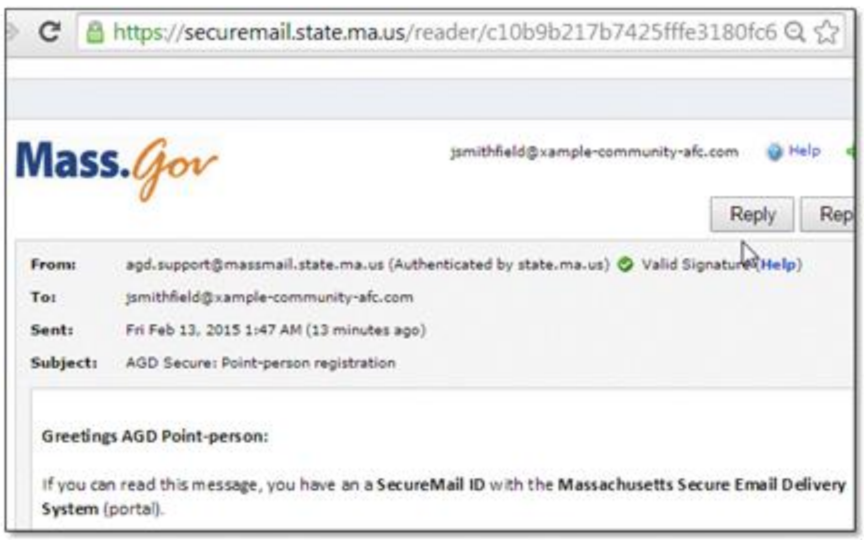
You may already have a SecureMail ID associated to your email address.

If so, after clicking [**Read Message**], you will be prompted to login to the SecureMail portal. Use the [**Forgot Password**] function if you can't remember your password: it will use the Question & Answer you set when you created the account.



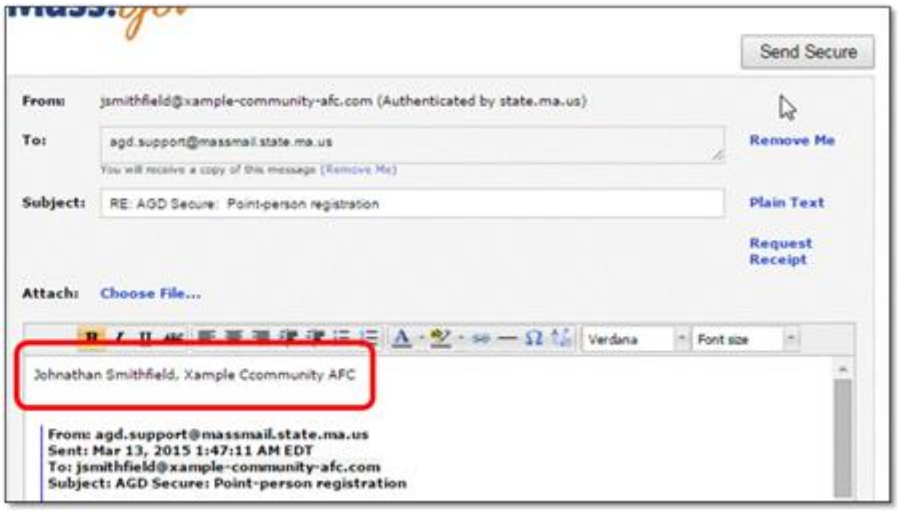
Once your Secure Email Account is setup and you have logged into the portal, you will see the actual message which contains the Protected Information in the email from AGD.Support@massmail.state.ma.us.

Click [**Reply**] to reply to the message.

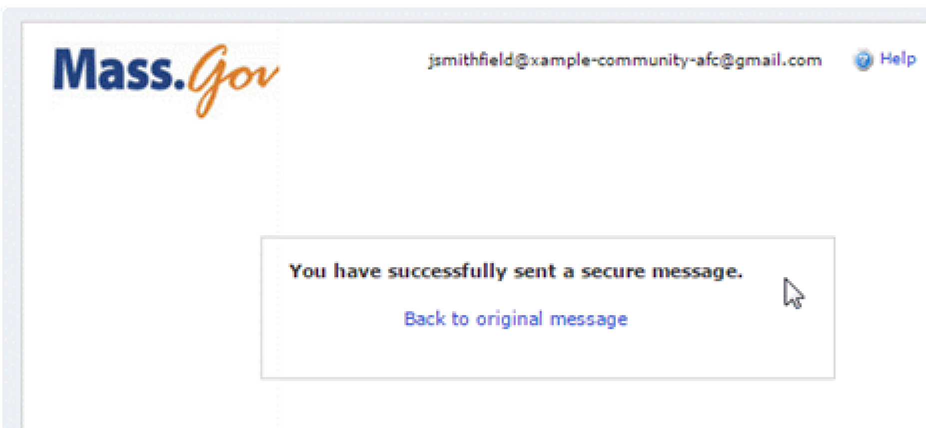


A message reply interface is displayed.

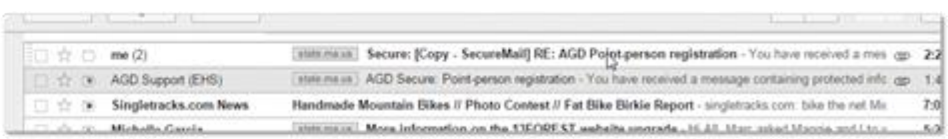
Add your name & the name of your organization. Click [**Send Secure**].



The portal displays a success message.



The system sends a copy of your reply's message envelope to your email address. Like the original message, you can only see its Protected Information in the Massachusetts SecureMail.



Note: the SecureMail portal does not archive or save your messages. No message list or Sent-mail is maintained. However, if you save the message "envelopes" in your own email application, you can access the Protected Information as needed.

How to send a secure email to AGD Support

> Note: These instructions work only for users whose email address is registered with SecureMail. See **How to Register with the Mass Secure Email Portal** (above).

The SecureMail portal is similar in functionality to other web-based email systems such as Hotmail or Gmail. A user opens a web browser, logs in and composes & sends a new message. There is familiar attachment and CC: functionality.

One difference: this portal is closely associated to your email address. The SecureMail portal does not maintain a Message List, Sent-Mail folder, or Trash folder of your previous messages. Copies of your secure messages will be sent to your email address - you use these to gain access to your inbound and sent-mail that is sent securely by OLTSS/MassHealth staff.

Q: When should I use SecureMail to communicate with AGD Support?

A: Every time!

As an AGD Point-person, we expect that your emails to **AGD Support** contain Protected Information (e.g. names & other personal identifiers, PHI or PII). Thus we take the universal precaution to require that all email communication uses secure encrypted email.

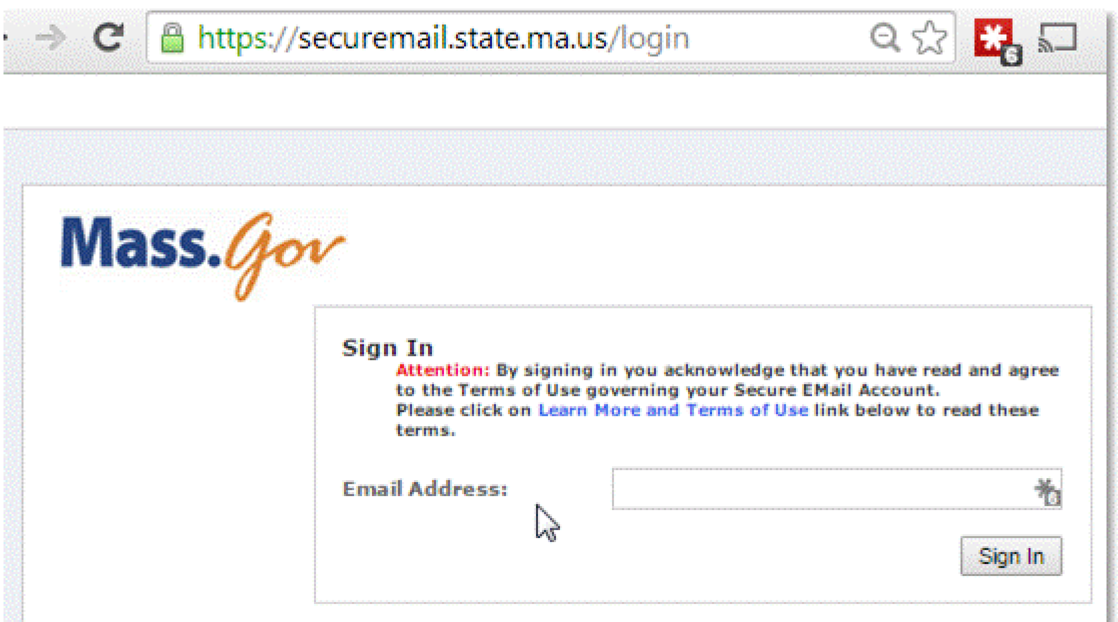
All messages to **AGD Support, on any subject,** must be sent securely using the process below.

Step 1: Login

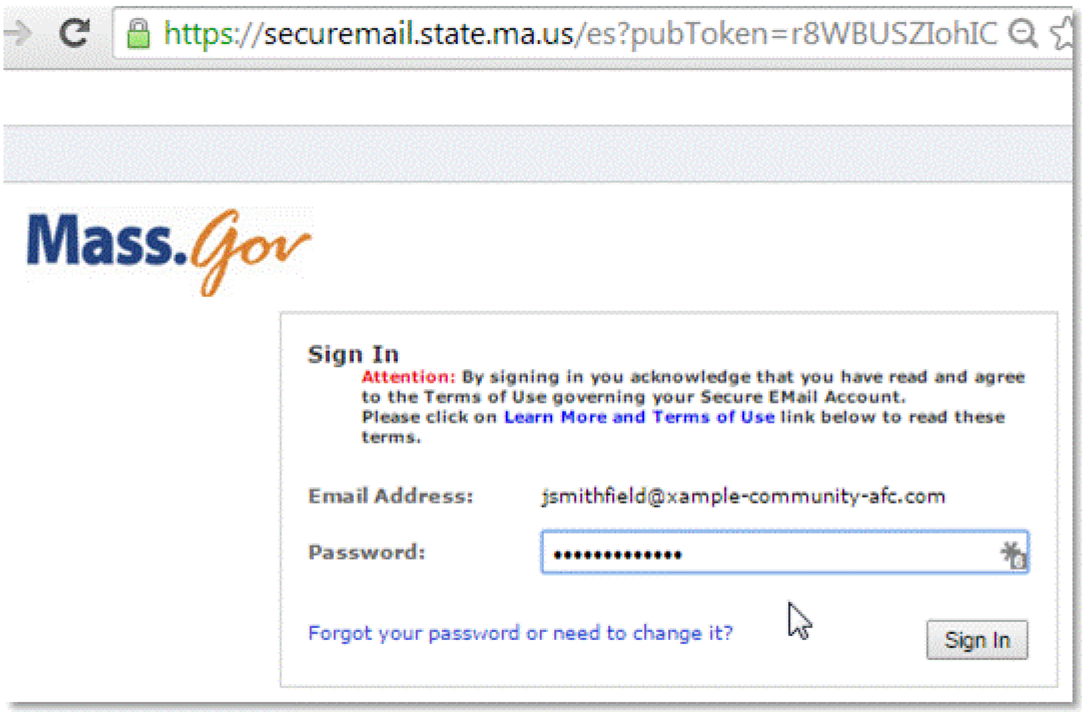
SecureMail Login: https://ppsecuremail.state.ma.us/encrypt

We suggest you bookmark this URL. Login is a 2-step process.

The first login screen is displayed. Enter **the email address** with which you are registered. Click [Sign In].

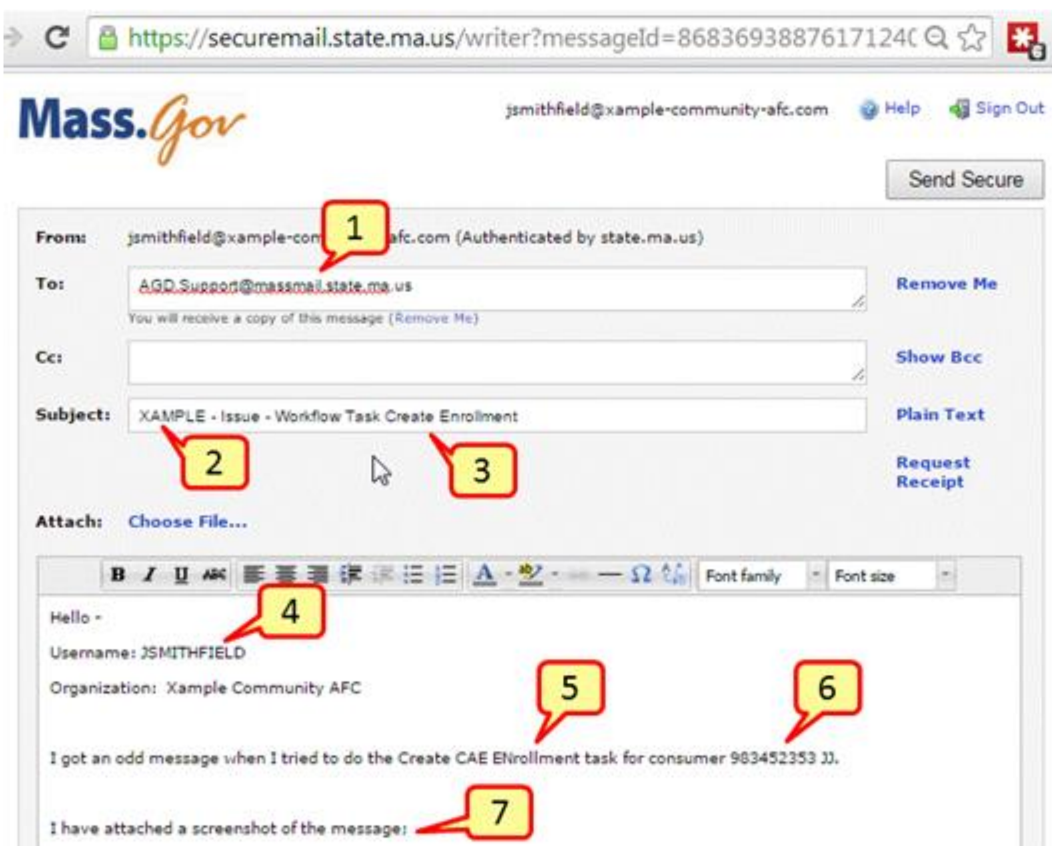


The second login screen is displayed. Enter **your password**, and then click [Sign In]. Alternately, click [Forgot Your Password].



Step 2: Compose your Message

If your password is correct, the Create New Secure Message interface is displayed.



The example above shows a clear & effective issue report to AGD Support. The numbered callouts demonstrate some features of a superior issue report. Key to the callouts above:

1. Address the email to AGD.Support@massmail.state.ma.us.

   Important: do not omit "massmail". This should be used whenever you use SecureMail to communicate with OLTSS/MassHealth staff.

2. Indicate your **Organization name in the Subject Line**

3. Make sure that your **Subject Line includes a clear, concise, and specific reference to the issue topic**. Don't be vague or generic.

4. Within the body of the email, indicate the **username of the person who experienced the problem**. You only need to provide one or two examples, not an exhaustive list.

5. A specific **indication of when the error occurs**. Here, the issue seems to be connected to the Create CAE Enrollment Workflow Task. What did the user expect to happen; what was the user trying to do?

6. **A reference to a specific consumer** for whom the issue was observed. The AGD Support standard is to **refer to a consumer by their SAMS ID and the consumer's initials**. Note: no other Protected Information should be in the email's message text: name, address, SSN, DOB, MassHealth number, etc.

7. **Screenshots** are provided to AGD Support. As with email message text, attachments or screenshots should *never* include name, address, SSN, DOB, MassHealth number. Instead, refer to a specific consumer by SAMS ID plus initials. Resolution of your issue can be delayed if key details are not provided with the initial report.

Step 3: Send Secure

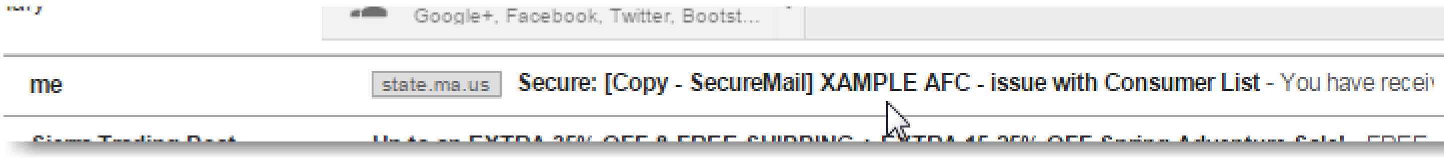
Click [Send Secure] to send your secure email. The system displays a success message confirming that the secure message was sent.

Close the browser window if you're done composing secure mail.

Step 4: You receive a copy of the secure email

A copy of your message is sent to your email account, as a sent-mail file copy. Note that the system has updated the subject line with **Secure: [Copy - SecureMail]** to indicate the message was, in fact, sent securely.

You will receive a secure message, you would need to login to the SecureMail portal to see its contents.



Help Files & Guide to Using SecureMail

There is some useful information available in the SecureMail's Help Files (available at https://securemail.state.ma.us/brand/zdm/help.ftl). Note that (login is *not* necessary to view Help Files.

- Receiving Secure Email
- Replying to Secure Email
- Forwarding Secure Email
- Sending Secure Email
- Using Message Receipts
- Using Zero Download Messenger Rich Content
- Security

<end>.