SAMS™
Family Caregiver Addendum

Family Caregiver Training Guide

Contents

Introduction

National Family Caregiver Service Program (NFCSP) - Title III(E) Data Management

SAMS 1.8., the software used as part of the SIMS project, has several features that relate directly to the National Family Caregiver Service Program. The *SAMS Family Caregiver Addendum* discusses SAMS setup and data entry as they relate to caregiver services reportable to the Administration on Aging (AoA). The *Addendum* also explores entering service data that might be required of your department or organization but that should not be reported to the AoA .

AoA Reporting Requirements for Family Caregiver Services

AoA reporting requires that Family Caregiver Services be broken down into "Group 1" and "Group 2" services.

Group 1 service reporting requires an unduplicated count of consumers served. All Services are reported for each Consumer.

Group 2 services only require an estimate of consumers served.   All Services are entered for a Consumer Group.

 In SAMS, all services are mapped to the five (5) AOA service groups (see Appendix 2).

Service	Group	Consumer / Consumer Group
Counseling/Support Group/Caregiver Training	Group 1	Consumer
Respite Care	Group 1	Consumer
Supplemental Services	Group 1	Consumer
Access Assistance	Group 2	Consumer Group
Information Services	Group 2	Consumer Group

For general reporting purposes, it's always preferable to enter service deliveries through the appropriate registered consumer. However, if no additional information about individual consumers is known or necessary, users can enter Group 2 service information using consumer groups (aggregate data). *SAMS Data Entry* (on page 4) outlines how to enter service data into both consumer and consumer groups.

SAMS Data Entry

Caregivers and care recipients are SAMS *Consumers*. Users need to create a *Consumer* record for both caregivers and care recipients if they do not already exist in SAMS. Only the caregiver needs to be enrolled into the Family Caregiver Support Program.

Once the records have been created, users establish a caregiver/care recipient relationship through *Consumer Detail*s.

Enrolling the Caregiver

Caregivers receiving Category I services in SAMS must have an association with a care recipient. In order for Services to be counted correctly, the Caregiver must be added to the SAMS database and enrolled in the Family Caregiver Support Program.

To enter a new caregiver

After you successfully login to SAMS,

> **1** Click **Consumers** .
>
> **2** Click **Search** to ensure that the caregiver's record does not exist in the database. The Search functionality in SAMS searches the entire statewide database so that you do not enter duplicate consumers by mistake.

Search Consumers

☐ **Consumer**	
Last name is like	and
First name is like	
Date of birth is	
SSN	
Social Sec. Last 4 Digits	
Client ID like	
AKA Name is like	
Mecicaid No. like	
Mecicare No. like	
Area Code	
Home Phone	
Alternate ID1 is like	
Ethnic Race	
⊞ **General**	
⊞ **Care Providers**	

Add New   Find   Clear

Client ID	Full Name	AKA Name	DOB	SSN	Town	Primary Phone
305101529	Anderson, Willie M		03/05/1910	123-45-1529	Boston	(617) 555-5555
325184640	Anderson, Eliza		03/25/1918	123-45-4640	Boston	(617) 555-5555
401140375	Anderson, Ann		04/01/1914	123-45-0375	Boston	(617) 555-5555
110275739	Anderson, Maudie		01/10/1927	123-45-5739	Boston	(617) 555-5555
507194547	Anderson, Alma R		05/07/1919	123-45-4547	Boston	(617) 555-5555
319042576	Anderson, Era		03/19/1904	123-45-2576	Boston	(617) 555-5555
125245041	Anderson, Edward B		01/25/1924	123-45-5041	Boston	(617) 555-5555
510127113	Anderson, Fannie		05/10/1912	123-45-7113	Boston	(617) 555-5555
422242818	Anderson, Evelena		04/22/1924	123-45-2818	Boston	(617) 555-5555

Details   OK   Cancel

3 If there is no match, click **Cancel** on the search consumer screen.

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

Consumers | Rosters | Routes | Reports | Contracts | Unit Distribution | Invoices | Payments

Consumers

✕ Close Consumers | Register | New | Open | ✕ Delete | Properties | Contacts | Care Enrollments | Service History | Care Recipients | Caregivers

Consumers ▼ (All) New (All) ▼ Apply Clear | Filter | Find | Search | Merge | Refresh | Print... | Print Preview...

**Perry, Alan Test - Guest1300008108, Kenneth ▼ Name ⬅ Previous ➡ Next | Sort Current Page

Consumers - Sorted By Name

ID	Name	Date Registered	Town of Residence	County of Residence	Primary Phone	Active?	Can
1370040...	**Perry, Alan Test	05/01/2007			(978) 777-111...	☑	
2014159...	312, ChesDudley M	02/01/2007	Roxbury	Suffolk	(617) 555-0900	☐	
1346033...	99, Agent	05/22/2007	Harwich	Barnstable	(508) 999-9999	☑	
1326839...	Aaaa, Aaa A	01/01/2006	Amherst	Hampshire	(282) 292-9181	☑	
1323562...	AAAbean, Bob	09/07/2007	Amherst	Hampshire	(603) 548-7548	☑	
1325236...	AaaBogus, Testonly R	09/06/2007	Accord	Plymouth		☑	
1324047...	Aardvark, Jason A	01/01/2006	Holyoke	Hampden	(617) 111-1111	☑	
1356574...	Aaron, Al	09/07/2007	Acushnet	Bristol	(508) 995-6565	☑	
1361765...	Aaron, Amelia	09/07/2007	Medford	Middlesex		☑	
1394587...	Aaron, Amos	09/07/2007	Newton	Middlesex		☑	
1394669...	Aaron, Amy	09/07/2007	Newton	Middlesex		☑	
1357589...	Aaron, Bobby	09/07/2007	Newton	Middlesex		☑	
1387661...	Aaron, Enis	09/07/2007	Newton	Middlesex		☑	
1303408...	Aaron, Erica	09/07/2007	Nantucket	Nantucket		☑	
1322141...	Aaron, Hank K	12/12/2006	Newton	Middlesex	(978) 555-555...	☐	
1362086...	Aaron, Hank T	03/21/2007	Halifax	Plymouth		☑	
1344161...	Aaron, Max	09/07/2007	Newton	Middlesex		☑	
1389167...	Aaron, Ty	05/13/2007	Berkley	Bristol		☑	
1318700...	Aarons, Aaron	09/07/2007	Newton	Middlesex		☑	
1300315...	Aasp, Dan A	01/01/2006	Newton	Middlesex	(617) 223-4234	☐	
1375798...	Aasper, Dan C	11/01/2006	Holyoke	Hampden	(617) 188-1838	☐	
1314329...	Aasperitis, Trudy	11/01/2006	Boston		(508) 929-2929	☑	
1385813...	Abagail, OCES Adams A	04/26/2007	Brockton	Plymouth		☑	
1365905...	Abcdefg, Bibby	09/07/2007	Newton	Middlesex		☑	
1376969...	Abdul, Paula L	03/26/2007	Braintree	Norfolk	(617) 555-6666	☑	

Page 1, 10003 of 59341 Items, 1 Selected   MISMANAGER SAMS2K_MA_SANDBOX 10/19/2007 10:12 AM

4 Click the **New** button (this will open a new consumer record) and enter as much information as possible. As noted in the Massachusetts Family Caregiver Support Program business rules, every

effort should be made to obtain the following Caregiver characteristics required by AoA for NAPIS reporting.

  (1) Relationship to Care Recipient
  (2) Age
  (3) Gender
  (4) Ethnicity
  (5) Ethnic Race
  (6) Care Recipient Age (this is especially important when care recipients are under the age 18).

5 After entering the information on the screen shown above, click **Care Enrollments** title (hyperlink).

6 Check the *Care Programs* list. The caregiver needs to be associated with the Family Caregiver Support Program Care Enrollment. SAMS will automatically enroll the Consumer in the NAPIS Title III program as a default. This Caregiver is not yet enrolled in the Family Caregiver Support Program Care Enrollment.

7 Click **Add Care Enrollment** and add the **Family Caregiver Support Program** Care Enrollment.
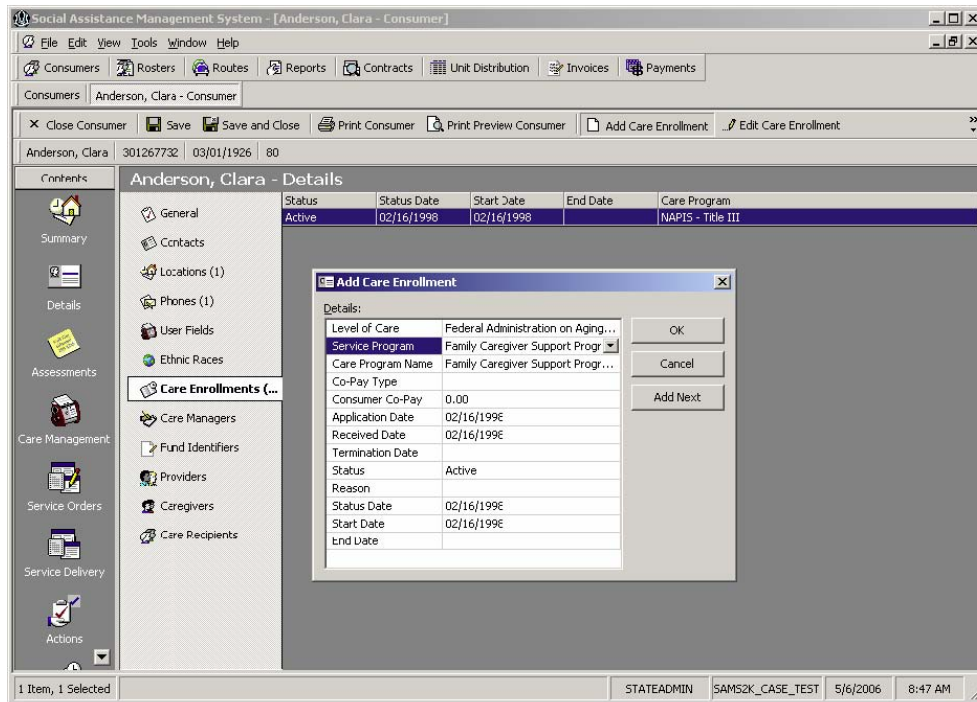
8 Click **Care Recipients**.
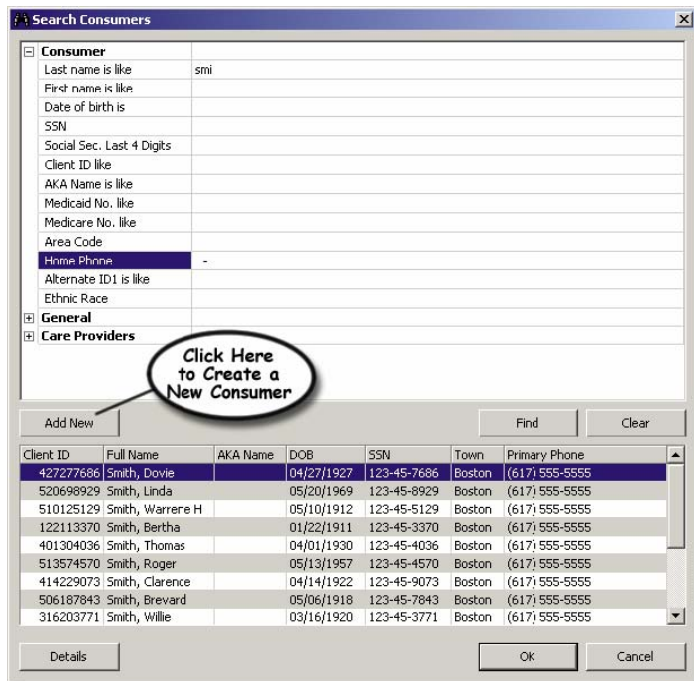
9 Click **New Care Recipient** .
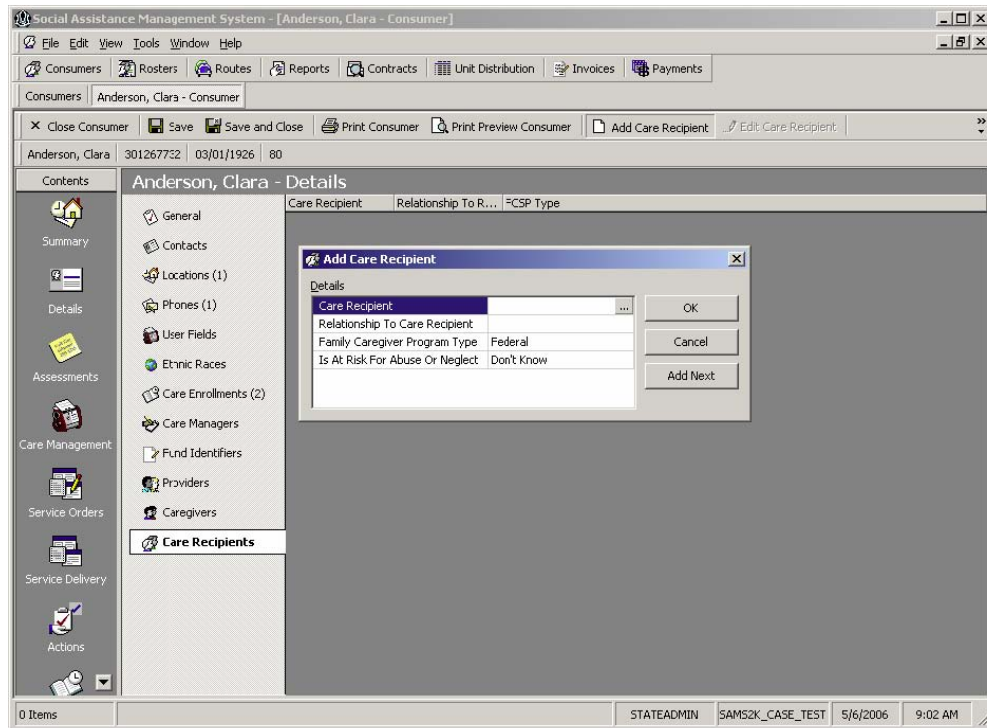
The care recipient relationships only needs to be identified in the caregiver's consumer record.

10 Click the **Browse** ![icon] button in *Care Recipient*.

11 Use *Search Consumers* to find the Care Recipient, if they do not exist, you will need to click New. Enter information as known and click **Find**.

12 Highlight the consumer.

13 Click **OK**.

14 Select a *Relationship to Care Recipient, Family Caregiver Program Type*.

15 Click **OK**.

16 Click **Save** ![icon] to save the changes to the caregiver record.

Entering Consumer Groups

Caregivers receiving Category II services, (including access assistance or information through print media, multimedia or group outreach,) are accounted for in SAMS through consumer groups. There is no requirements to gather characteristics information on these caregivers however, it is necessary to record the estimated count of consumers in such a consumer group.

To create a new consumer group

1 Click **Consumers** .

2 Use the list in the upper left to select **Consumer Groups**.
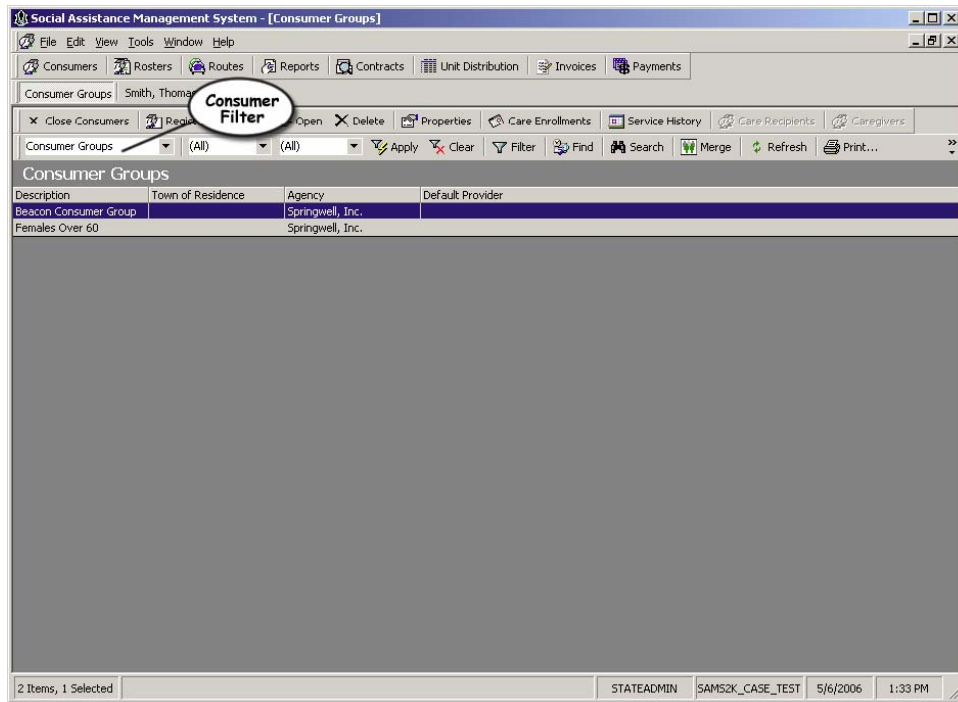
3 Click **New**
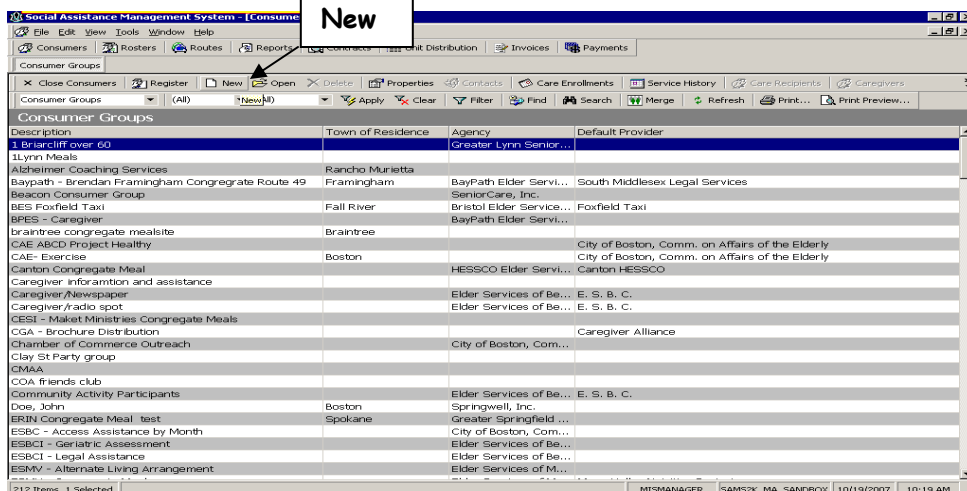
4 Use the description field to name the consumer group.

> *The following distinct consumer groups should be created in SIMS at the AAA/ASAP level using the following naming structure: Newspaper readership, TV/local cable stations viewership, radio station audience, working caregivers, community activity participants, COA/Senior Center participants, civic organizations membership, health fairs participants and general caregiver inquiries group.*

5 Click **Care Enrollment**

6 Click **Add Enrollment**

7 Enroll Consumer Group in the **Family Caregiver Support Program – Title III(E)**
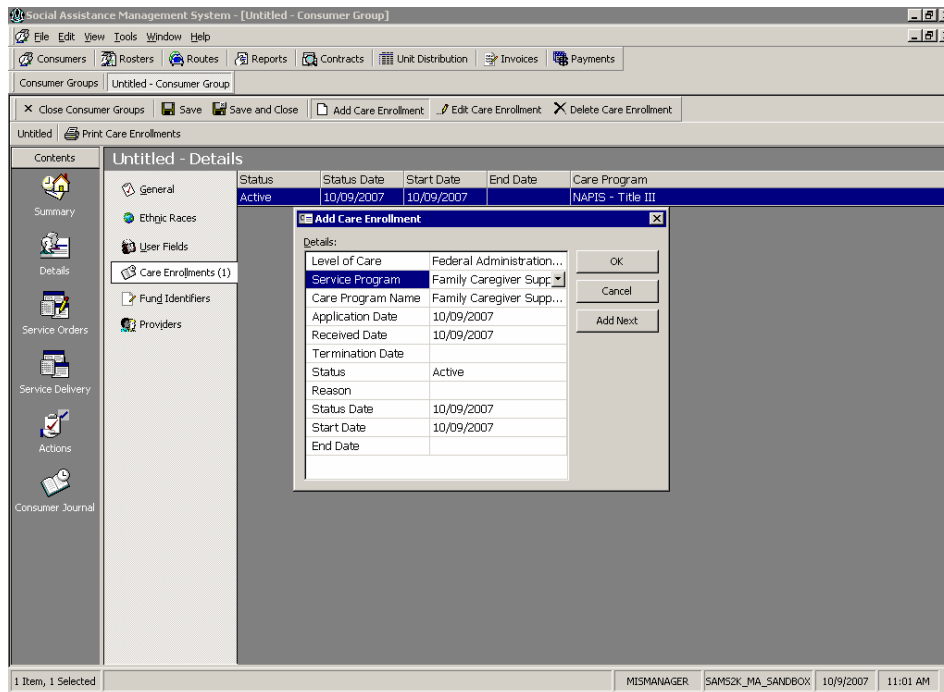
Entering Service Orders

Service Orders are required for all Services that involve an external provider contract, sub-grantees, or if they are required by your ASAP / AAA business practices.

This section explains how to add a Service Order if it is required.

1 Click **Service Orders** in the Consumer record.

2 Click **Add Order** on the toolbar.

3 Fill in the following:

Care Program Name: Family Caregiver Support Program – Title III(E)

Agency: Springwell

Provider: Greater Boston Chinese Golden Age Center

Effective Date: Enter today's date

4 In the right hand pane of the screen, click **Add Item.**

5 Select a *Service* of **Respite - Adult Day Health**

6 Enter in *Ordered Units* field, type in 16 - please be aware that the unit types (i.e. hour, session, day) differ based on the service, reference Appendix 2 for more information on SAMS unit types for each service.

7 Press **Apply and Close Item.**

8 Press **Save and Close** and choose "Yes" to save the Service Order.

Service Order							
Order No.		☐ Add Item ✎ Edit Item ✕ Delete Item ⚡ Apply & Close Item ✕ Close Item					
Care Program Name	Family Caregiver Support Program...	Subservice	Ordered	Price	Cost	Delivered	Status	Reason
Agency	Springwell, Inc.						
Provider	Greater Boston Chinese Golden Ag...						
Subprovider							
Effective Date	03/13/2007						
Expiration Date							
Cost	$0.00						
Order Items	0 Items						

Instructions

Service Order Item	
Service Category	Respite/Day Services
Service	Respite - Adult Day Health
Fund Identifier	
Subservice	(0 Items)
Ordered Units	16.00
Unit Price	$325.00
Ordered Cost	$5,200.00
Status	Open
Reason	
Status Date	03/13/2007
Delivered Units	0.00
Comments	

The Consumer Journal

The *Consumer Journal* is used for the documentation of specific caregiver information, such as the following:

- Results of a Caregiver assessment

- Notes regarding a Home Visit

- Telephone contacts

• Services

To add a general journal entry to a consumer

10 Click **Consumer Journal** in the *Navigation* pane.

11 Click **Add Journal Entry** ☐ .

12 Choose the *Journal Type* from the drop-down list that best describes the activity.

13 Enter a *Subject* of "Result of Caregiver Assessment"
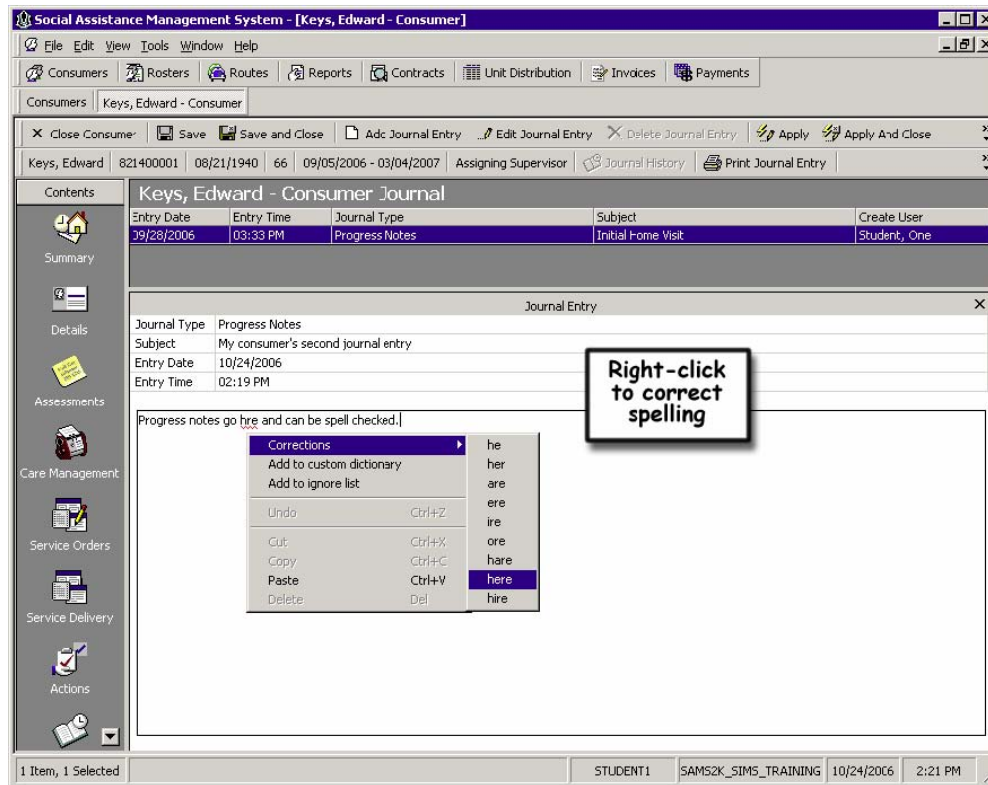
14 Write journal entry in the text box below.

15 Right-click or select **Spelling** from the **Tools** menu to perform a spell check.

16 Click **Apply and Close** .

17 Click **Save** to save the changes to the consumer.

Printing Consumer Journals

You can print a list of consumer journal entries, the details for any one journal entry, or a journal log. The journal log prints the entries you select in one report.

To print a consumer journal entry

18 Highlight the journal entry.

19 Click **Print Preview Journal Entry** .

-OR- From the **File** menu, select **Print Preview**.
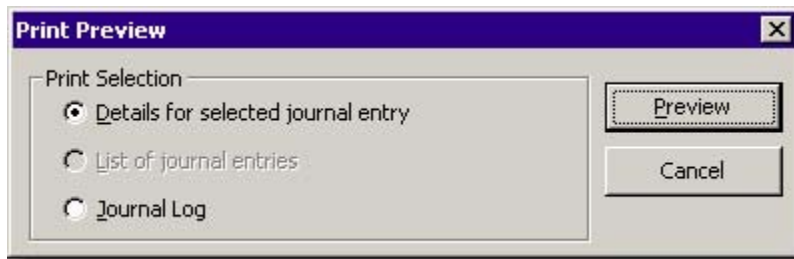
20 Select *Details for selected journal entry*.

21 Click **Preview.** SAMS displays the *Print Preview* screen.
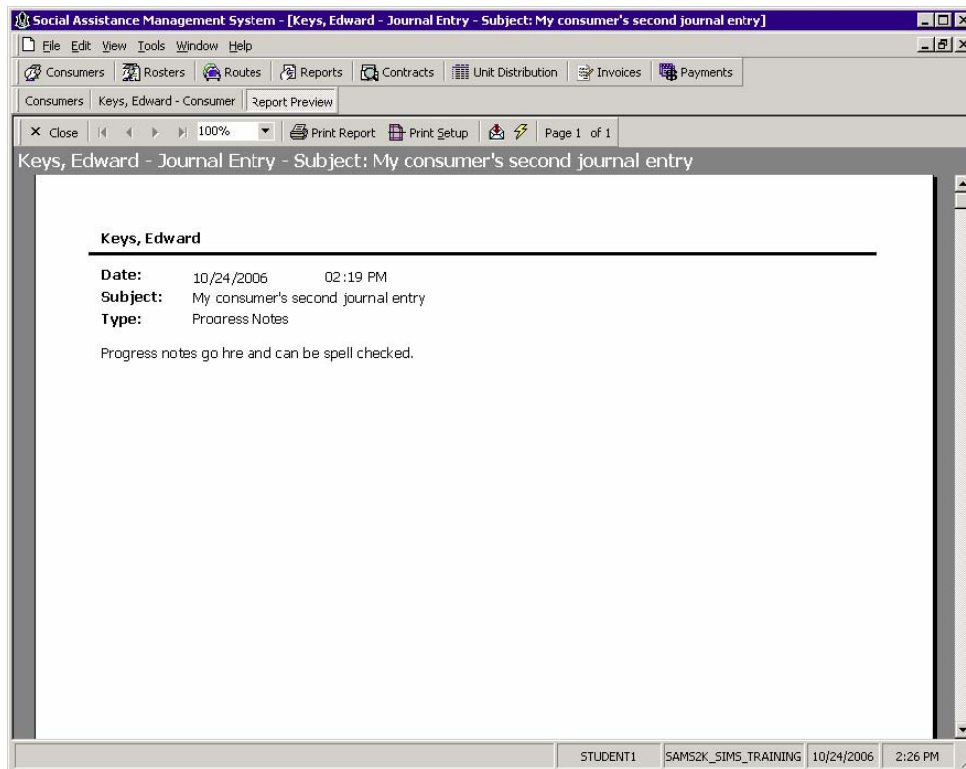
22 If you want to print the journal entry, click **Print Report** . Let's skip this step and close the screen.

23 Click **Close** .

Entering Service Deliveries

Service Deliveries must be documented for all caregiver services. Accurate service delivery information is critical since data from Service Deliveries is used to generate the NAPIS report and monthly invoice back-up.

As mentioned in previous sections, users must enroll caregivers in the Family Caregiver Support Program and identify a *Care Recipient* in the *Consumer Details*. Once the caregiver/care recipient relationship has been setup, users can enter services deliveries.

Services Delivered to Caregivers

Users record services to caregivers in a similar manner to typical service deliveries to Home Care clients. However, users must select the *Care Recipient* to ensure that the delivery is reported as a Title III(E) service.

To record services delivered to caregivers

1 Click **Consumers** .

2 Use **Find** or **Search** or scroll through the *Consumers* list to find the consumer you need.

3 Highlight the consumer.

4 Double-click their record.

-OR- Click **Open** on the toolbar.

5 Click **Service Deliveries**.

6 Click **Add Service** .

7 Select the *Care Program* and *Provider*.

8 Select the *Care Recipient*.

9 Enter the *Units.*

10 Click **Apply & Close** .

Recording Service Deliveries for Session Services

The actual date of delivery needs to be specified on service delivery records for all session services. The specific services defined as session services in SAMS are: Caregiver Counseling, Caregiver Support Groups, Caregiver Training & Education, and Alzheimer's/Dem. Assessment/Coaching. In order for the session service to be calculated correctly on the NAPIS SRT, users must identify which days the session service were actually delivered on. To identify the days of delivery, users should use the **Daily Unit Details** portion of the service delivery record.

To record services delivered to caregivers

1 Click **Consumers** .

2 Use **Find** or **Search** or scroll through the *Consumers* list to find the consumer you need.

3 Highlight the consumer.

4 Double-click their record.

-OR- Click **Open** on the toolbar.

5 Click **Service Deliveries**.

6 Click **Add Service** .

7 Select the *Care Program* and *Provider*.

8 Select the *Care Recipient*.

9 Click on **Daily Unit Details.**

10 When the Calendar shows up, enter the unit(s) on the day(s) the service was actually delivered on.

11 Click **OK**.
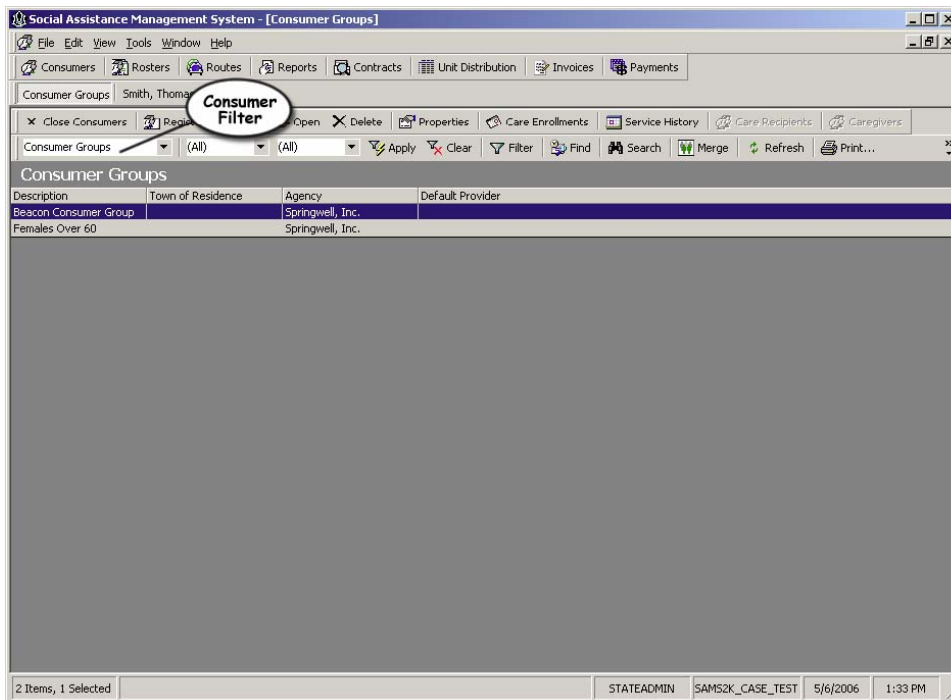
12 Apply & Close .

Recording Data for Consumer Groups

To record services to a group of consumers

1 Click **Consumers** .

2 Use the list in the upper left to select **Consumer Groups**.

3 Use **Find** or **Search** or scroll through the list to find the consumer group you need.

4 Highlight the consumer group.

5 Double-click their record.

-OR- Click **Open** on the toolbar.

6 Click **Service Deliveries**.

7 Click **Add Service** .

Beacon Consumer Group - Service Delivery

Service	Provider	Care Program Na...	Service...	Clients Served	Topics	Tcpics Compl...	Type	Total Units

Service Delivery ✕

Care Program	Family Caregiver Support Program - Title III(e) (05/06/2006)
Service Category	Information and Assistance
Service	Information and Assistance
Subservice	
Fund Identifier	
Topics	(0 Items)
Service Month	05/2006
Agency	Springwell
Provider	
Subprovider	
Site	
Place of Service	
Consumers Served	25
Total Units	25.00
Units/Consumer	1.00000000
Unit Price	$0.00
Daily Unit Details	(0 Items)
Total Cost	$0.00
Diagnosis Code	
Service Order	(None)
Comments	

Enter Consumers Served & Total Units for NAPIS Reporting

8 Select the *Care Program, Service,* and *Provider.*

9 Enter the number of *Consumers Served* and the *Total Units.* (note: please review MFCSP Business Rules document to ensure you are not duplicating estimated count).

10 Click **Apply and Close** to save the service delivery.

.

Reporting in SAMS

Agency Summary Report - a summary of services provided by an agency. Displays services and subservices - groups by Provider by default.

In SAMS,

>   **1** Click on **Reports**
>
>   **2** Click on **Services** (left-hand Category Pane)
>
>   **3** Click on **Agency Summary Report** (right-hand upper pane)
>
>   **4** Filling out the following fields:
>
>   - Title – name the report starting with your agency's prefix.
>
>   - Service Delivery Start Date (on or after)
>
>   - Service Delivery End Date (on or before)
>
>   - Agency
>
>   - Service Program = Family Caregiver Support Program – Title III(E)
>
>   **5** Click **Print Preview** to view the report

Report definitions can be saved, so that the next month you can click on the same report and just change the service delivery start and end dates.

MFCSP Characteristics Quality Control Report - The MFCSP Characteristics Quality Control report is a tool to assist agencies' monthly to identify and view Massachusetts FCSP records which do not contain defined caregiver relationships or are missing NAPIS required data. This will alert users to records requiring the relationship or data be changed or added.
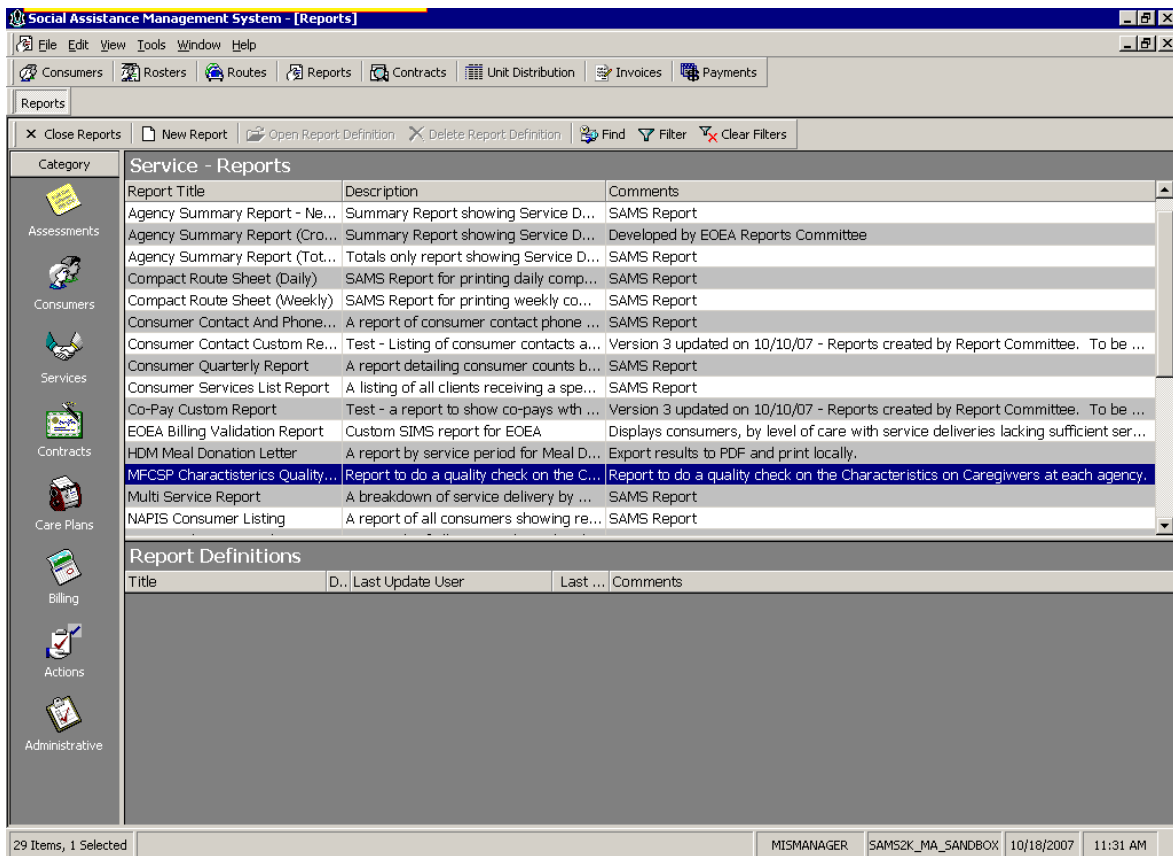
Reporting to EOEA

Agency Reporting Process:

	Task	Who's Responsible
1	Caregiver characteristic data, FCSP enrollment, service orders/deliveries entered into SAMS.	Caregiver Staff/Fiscal
2	Run MFCSP Characteristics Quality report assuring all required data is entered in SAMS.	Caregiver Staff
3	Go back into caregiver records to input any missing data.	Caregiver Staff
4	Run Monthly Napis SRT report and export sections I.E, I.F, II.B, and II.C on to local laptop in excel format.	AAA planner
5	Information gathered from NAPIS SRT report used to populate MAFCSP data report.	Caregiver Staff
6	Complete additional expenditure data and caregiver invoice submission forms	Fiscal
7	Monthly invoice back-up report sent electronically to EOEA	Fiscal

Running Agencies' Monthly NAPIS SRT report

The following section outlines the process for running & exporting the caregiver sections of a NAPIS report from AgingNetwork.com to the local machine for the purposes of collection and submitting a caregiver expenditure data to EOEA.

1. AAA Planner will run the NAPIS SRT for the month that you are invoicing EOEA for (refer to NAPIS SRT training manual for more detail on this step).
2. Click on the Report icon from the toolbar

3. Select the Report that you have just run in step 1.
4. Go to Print Report. From the Toolbar
5. Choose Section I.E. in the report.
6. Choose Export Active Sheet from Toolbar

7. Specify the format you wish to export the data to
   a. Choosing for your Format – MS Excel 97-2000
   b. Destination is Disk File

        c.   Select OK
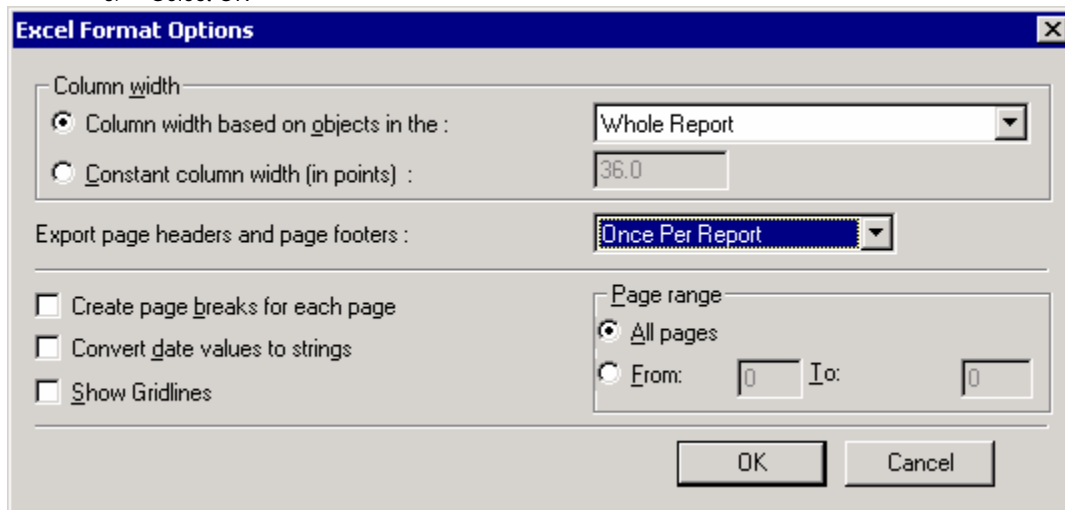
Export

Format:

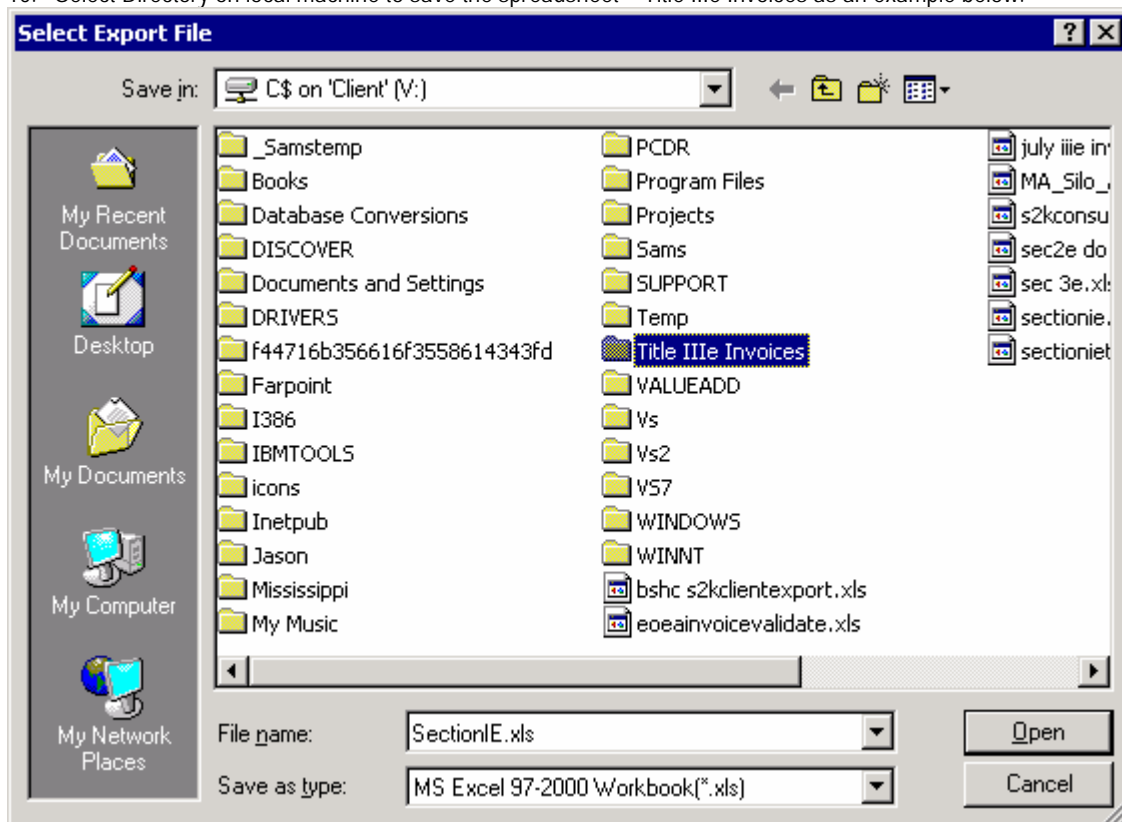MS Excel 97-2000

Destination:

Disk file

OK

Cancel

8. Export options
   a. Column width based on objects in the "Whole Report"
   b. Export Page Headers and Page Footers "Once Per Report"
   c. Select OK

Excel Format Options

Column width

☉ Column width based on objects in the :   Whole Report

○ Constant column width (in points) :   36.0

Export page headers and page footers :   Once Per Report

☐ Create page breaks for each page

☐ Convert date values to strings

☐ Show Gridlines

Page range

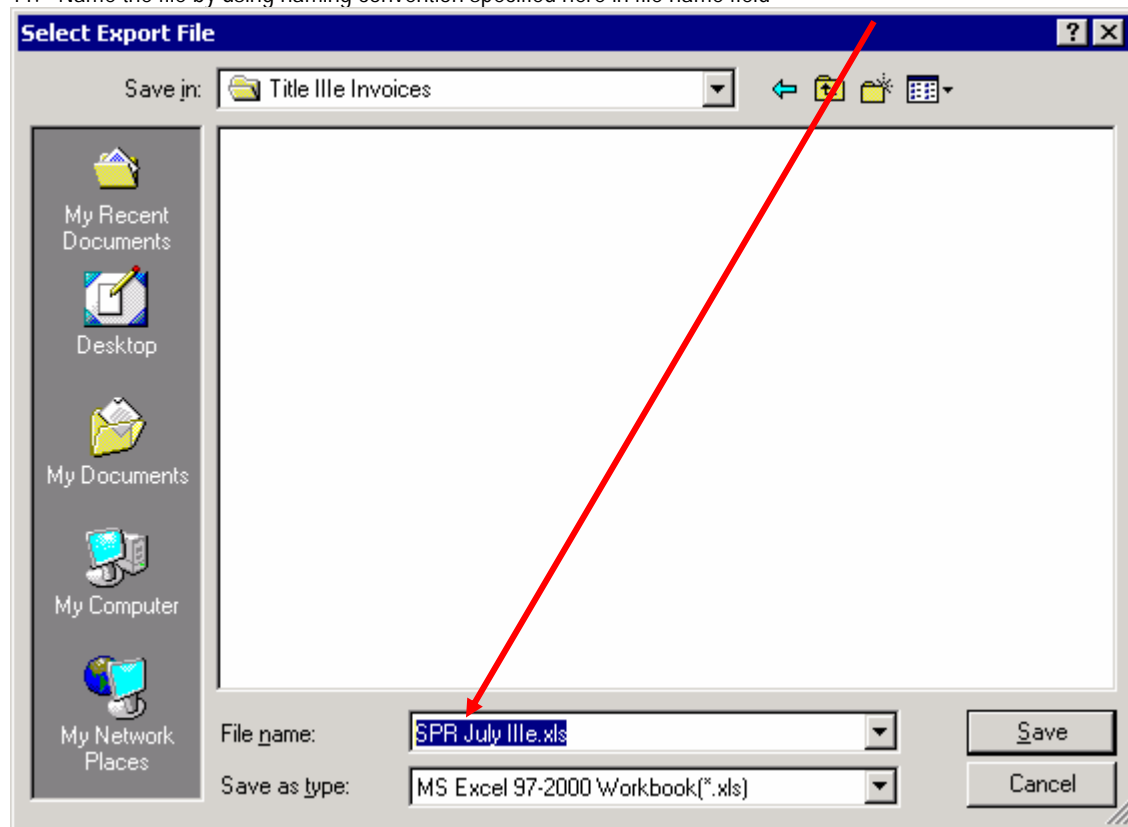☉ All pages

○ From: 0 To: 0

OK   Cancel

9. Export to the local users C: drive, which is the Network V: (We already have documentation on using the V: drive as the local C: which we can use here.)
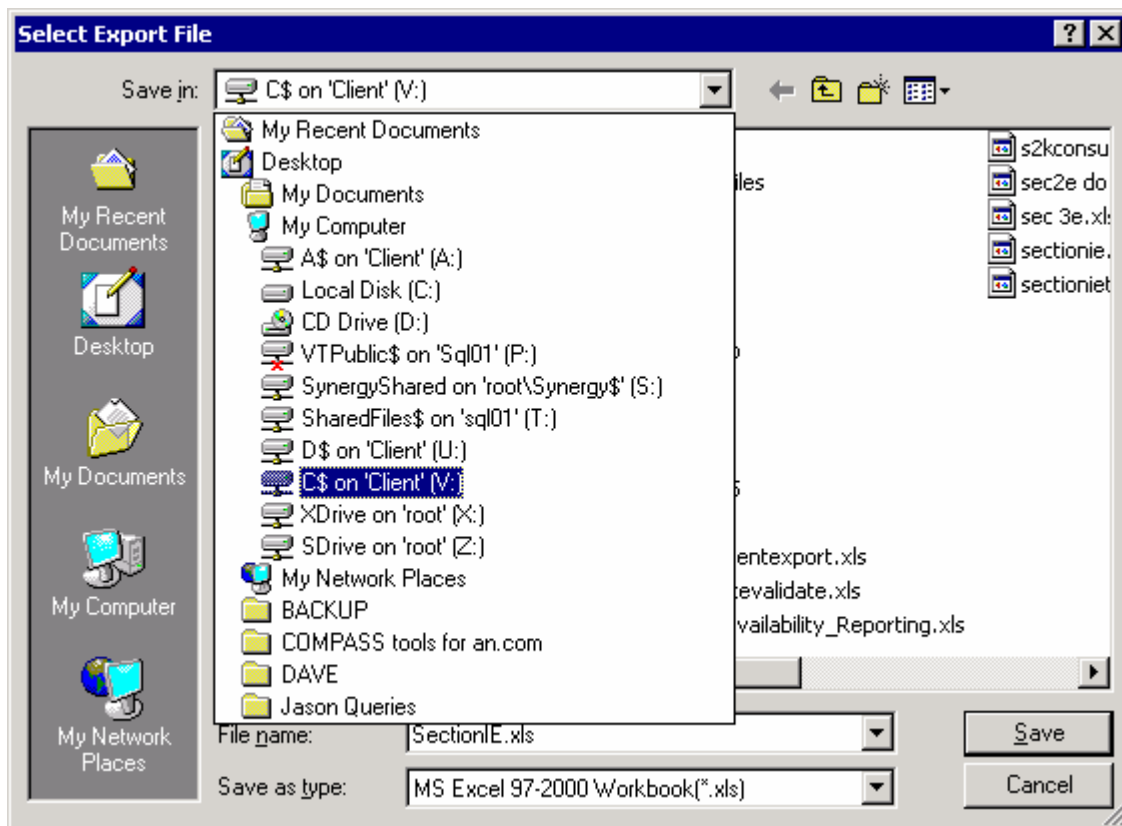
10. Select Directory on local machine to save the spreadsheet – Title IIIe Invoices as an example below.

11. Name the file by using naming convention specified here in file name field

Select Export File

Save in: Title IIIe Invoices

My Recent Documents
Desktop
My Documents
My Computer
My Network Places

File name: SPR July IIIe.xls

Save as type: MS Excel 97-2000 Workbook(*.xls)

Save
Cancel

12. Save the file to your hard drive by choosing Save from the dialog box above.
13. Go to the C: drive and directory specified on local machine
14. Open the file that was just created. Copy and paste into the invoice spreadsheet.
15. Repeat steps 5-14 choosing NAPIS report section I.F.
16. Repeat steps 5-14 choosing NAPIS report section II.B.
17. Repeat steps 5-14 choosing NAPIS report section II.C.

Appendix 1 – Caregiver Contracts

The contract's manager at each agency should setup a SAMS Contract with the Agency listed as the Provider (i.e. Agency = Coastline Elderly Services, Inc; Provider = Coastline Elderly Services, Inc.). The following caregiver services should be listed in the agencies contract:

- Campership/After School Program
- Caregiver Counseling
- Caregiver Support Group
- Caregiver Training & Education
- Information & Assistance
- Multimedia Outreach
- Outreach
- Print Media Outreach
- Respite Service/Scholarships/Subsidies
- Supplemental Service Scholarships/Subsidies
- Add others as needed

Click on **New Contract**
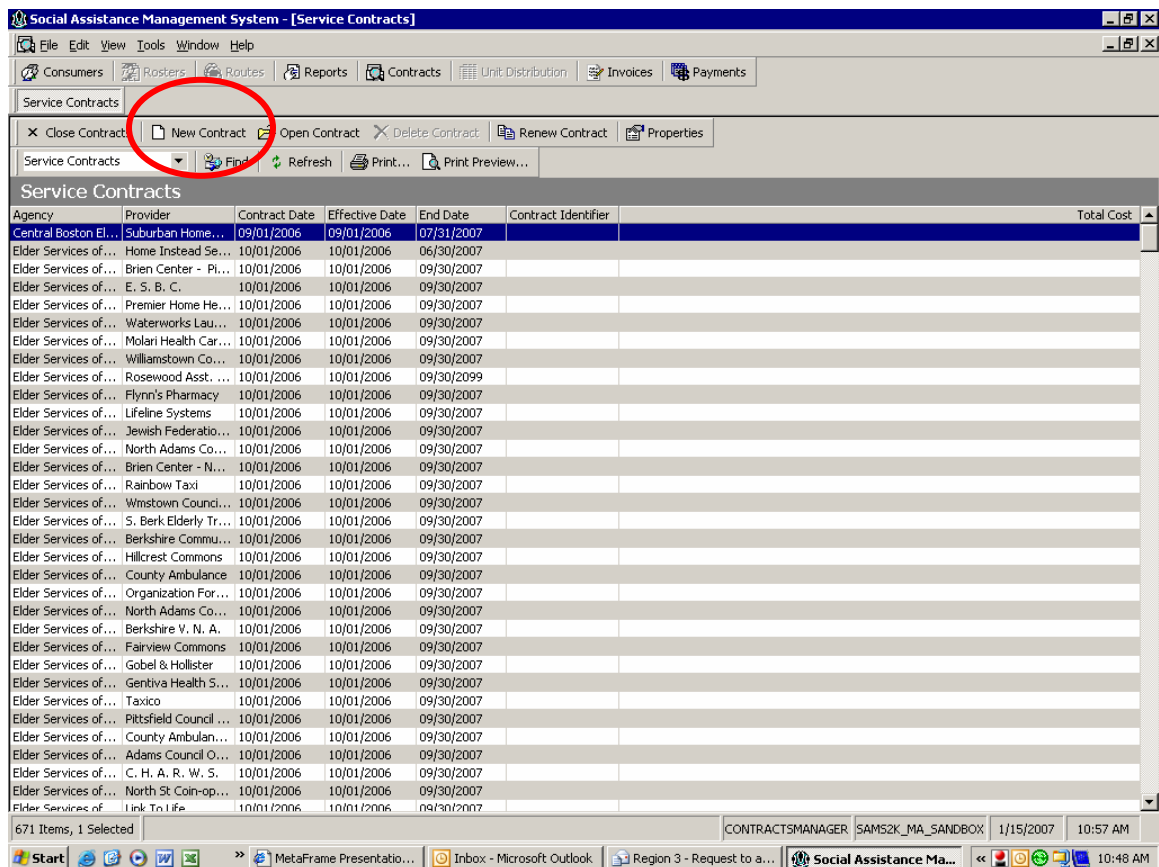
This is the new contract screen. You must begin to fill in the fields below.

This screen is an example of the new contracts fields filled in before saving. Notice that you will need to fill in the Description Field. Agency and Provider were filled in from a pull down box with limited choices. The contract dates should be the date you want the contract to start, the effective date is the same. The End Date should be a couple of years out but needs to be filled in. Once you are done with this you add items to the contract by clicking on ITEMS on the left panel.

This is the screen display that appears once you lick on **ITEMS** on the left and **Add Contract Item** on the top bar

Begin to fill in the fields to add a service. Enter in Caregiver Counseling. *If you do not see the caregiver services listed in the drop down, please contact SIMS Support to have them added* Click on **Add Contract Item** if you have more services to add. . If not, click **Save and Close** and you will be brought back to the main contracts screen. Click on **REFRESH** and then Search for the contract that you just added.

You will be prompted to apply the changes, click **Yes**.

Social Assistance Management System - [Coastline Elderly Services, Inc. - Service Contract]

File   Edit   View   Tools   Window   Help

Consumers | Rosters | Routes | Reports | Contracts | Unit Distribution | Invoices | Payments

Service Contracts | Coastline Elderly Services, Inc. - Service Contract

× Close Contract | Save | Save and Close | Add Contract Item | Edit Contract Item | × Delete Contract Item | Expand All | Collapse All

Unknown | Coastline Elderly Services, Inc. | Coastline Elderly Services, Inc. | 10/01/2007 | 10/01/2007 - 09/30/2008 | Print Contract | Print Preview Contract

Coastline Elderly Services, Inc. - Contract Items

Fund Identifier	Unit Price	Contrac...	Contracte...	Delivered ...	Delivered ...	Open Order ...	Open Order ...	Units Remain...	Dollars Rema...
Caregiver Counseling									
(None)	$0.00								
Caregiver Support Group									
(None)	$0.00								
Caregiver Training & Education									
(None)	$0.00								
Information and Assistance									
(None)	$0.00								
Outreach									
(None)	$0.00								
Supplemental Service Scholarships/Subsidies									
(None)	$0.00								

Contents

Details

Items

0 Items | MISMANAGER | SAMS2K_MA_SANDBOX | 10/4/2007 | 4:05 PM

Appendix 2 – Massachusetts Family Caregiver Support Program – Service List