



Family Caregiver Training Guide

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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 Details*.


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

Medicaid No. like

Medicare 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, Evelana		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

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

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

**Perry, Alan Test - Guest130008106, 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...	<input checked="" type="checkbox"/>	
2014159...	312, ChesDudley M	02/01/2007	Roxbury	Suffolk	(617) 555-0900	<input checked="" type="checkbox"/>	
1346033...	99, Agent	05/22/2007	Harwich	Barnstable	(508) 999-9999	<input checked="" type="checkbox"/>	
1326839...	Aaaa, Aaa A	01/01/2006	Amherst	Hampshire	(282) 292-9181	<input checked="" type="checkbox"/>	
1323562...	AAAbear, Bob	09/07/2007	Amherst	Hampshire	(603) 548-7548	<input checked="" type="checkbox"/>	
1325236...	AaaBogus, Testonly R	09/06/2007	Accord	Plymouth		<input checked="" type="checkbox"/>	
1324047...	Aardvark, Jason A	01/01/2006	Holyoke	Hampden	(617) 111-1111	<input checked="" type="checkbox"/>	
1356574...	Aaron, Al	09/07/2007	Acushnet	Bristol	(508) 995-6565	<input checked="" type="checkbox"/>	
1361765...	Aaron, Amelia	09/07/2007	Medford	Middlesex		<input checked="" type="checkbox"/>	
1394587...	Aaron, Amos	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1394669...	Aaron, Amy	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1357589...	Aaron, Bobby	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1387661...	Aaron, Enis	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1303408...	Aaron, Erica	09/07/2007	Nantucket	Nantucket		<input checked="" type="checkbox"/>	
1322141...	Aaron, Hank K	12/12/2006	Newton	Middlesex	(978) 555-555...	<input checked="" type="checkbox"/>	
1362086...	Aaron, Hank T	03/21/2007	Halifax	Plymouth		<input checked="" type="checkbox"/>	
1344161...	Aaron, Max	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1389167...	Aaron, Ty	05/13/2007	Berkley	Bristol		<input checked="" type="checkbox"/>	
1318700...	Aarons, Aaron	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1300315...	Aasp, Dan A	01/01/2006	Newton	Middlesex	(617) 223-4234	<input checked="" type="checkbox"/>	
1375798...	Aasperis, Dan C	11/01/2006	Holyoke	Hampden	(617) 188-1838	<input checked="" type="checkbox"/>	
1314329...	Aasperis, Trudy	11/01/2006	Boston		(508) 929-2929	<input checked="" type="checkbox"/>	
1365813...	Abagail, OCES Adams A	04/26/2007	Brockton	Plymouth		<input checked="" type="checkbox"/>	
1365905...	Abdefg, Bibby	09/07/2007	Newton	Middlesex		<input checked="" type="checkbox"/>	
1376969...	Abdul, Paula L	03/26/2007	Braintree	Norfolk	(617) 555-6666	<input checked="" type="checkbox"/>	

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).

Untitled - Details

General

- Contacts
- Locations
- Phones
- User Fields
- Ethnic Races
- Care Enrollments (1)
- Co-Pay
- Care Managers
- Fund Identifiers
- Providers
- Caregivers
- Care Recipients
- Service Suspension

Personal

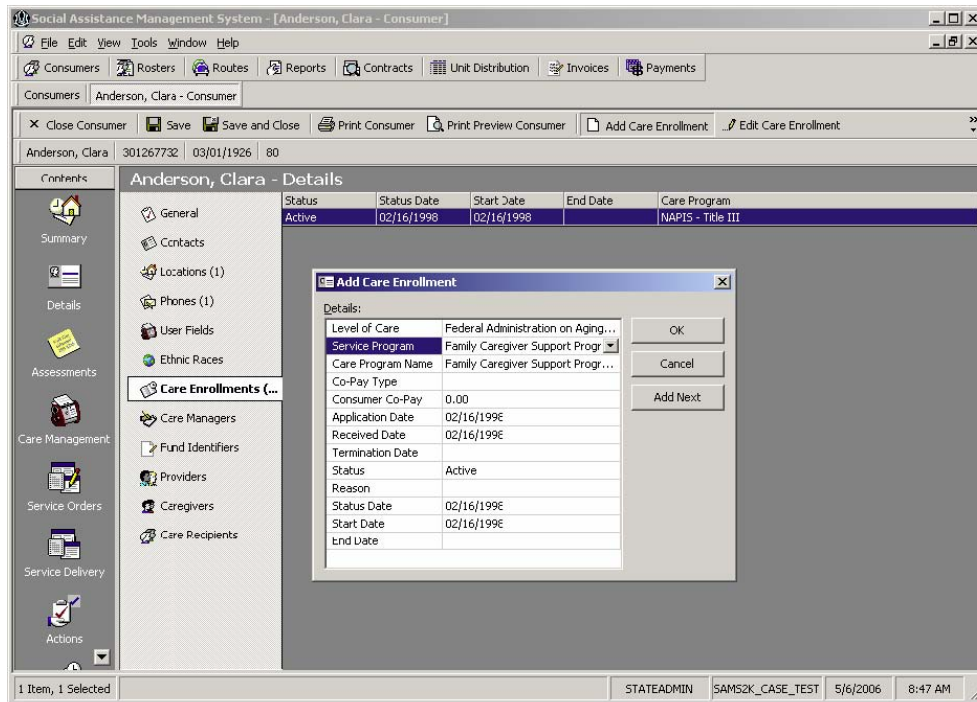
Prefix	
First Name	
MI	
Last Name	
Suffix	
Maiden Name	
AKA Name	
Date Registered	02/19/2007
Consumer Details Last Reviewed	02/19/2007
Marital Status	
Gender	
Birth Date	
SSN	
Info Release Authorized	No
Default Agency	
Area Code	
Home Phone	
Residential Address	
Mailing Address	
NAPIS	
Status	
Insurance	
Other	
Characteristics	

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.

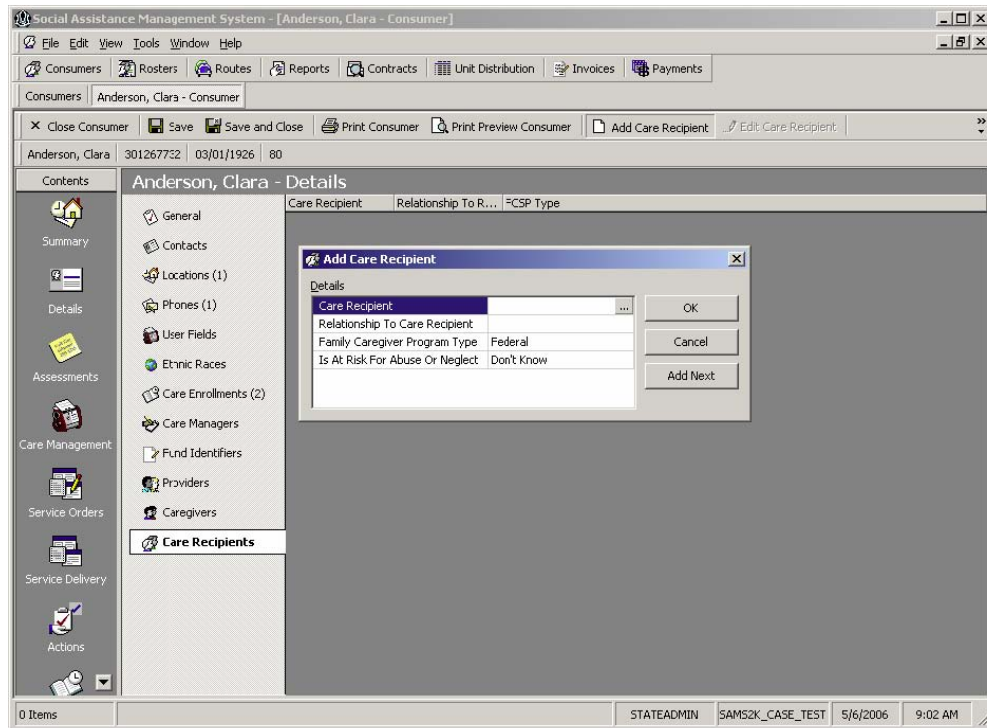
7 Click **Add Care Enrollment** and add the **Family Caregiver Support Program** Care Enrollment.





8 Click Care Recipients.

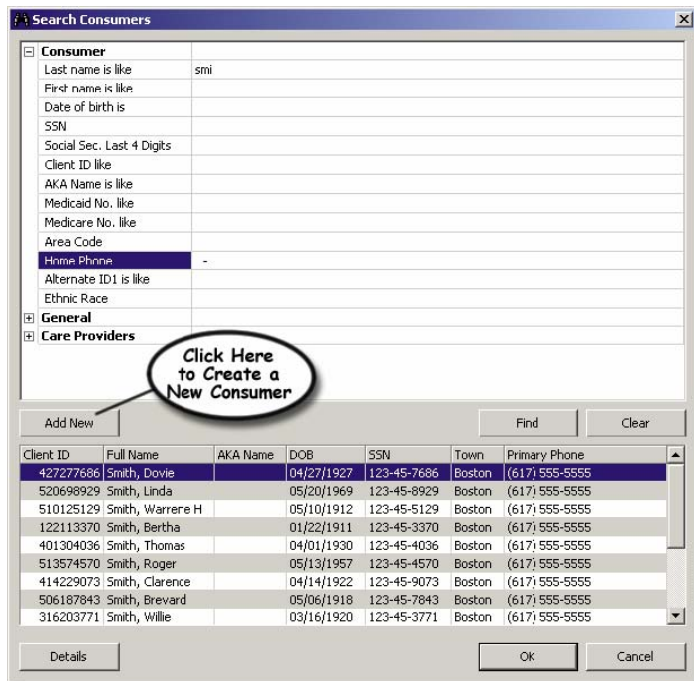
9 Click New Care Recipient 



The care recipient relationships only needs to be identified in the caregiver's consumer record.

10 Click the **Browse**  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**.



The **Search Consumers** dialog box contains a form with the following fields:

- Consumer
 - Last name is like: smi
 - First name is like:
 - Date of birth is:
 - SSN:
 - Social Sec. Last 4 Digits:
 - Client ID like:
 - AKA Name is like:
 - Medicaid No. like:
 - Medicare No. like:
 - Area Code:
 - Home Phone:
 - Alternate ID1 is like:
 - Ethnic Race:
- General
- Care Providers

Buttons: Add New, Find, Clear, Details, OK, Cancel.

A callout bubble points to the **Add New** button with the text: "Click Here to Create a New Consumer".

Client ID	Full Name	AKA Name	DOB	SSN	Town	Primary Phone
427277686	Smith, Dovie		04/27/1927	123-45-7686	Boston	(617) 555-5555
520698929	Smith, Linda		05/20/1969	123-45-6929	Boston	(617) 555-5555
510125129	Smith, Warren H		05/10/1912	123-45-5129	Boston	(617) 555-5555
122113370	Smith, Bertha		01/22/1911	123-45-3370	Boston	(617) 555-5555
401304036	Smith, Thomas		04/01/1930	123-45-4036	Boston	(617) 555-5555
513574570	Smith, Roger		05/13/1957	123-45-4570	Boston	(617) 555-5555
414229073	Smith, Clarence		04/14/1922	123-45-9073	Boston	(617) 555-5555
506187843	Smith, Brevard		05/06/1918	123-45-7843	Boston	(617) 555-5555
316203771	Smith, Willie		03/16/1920	123-45-3771	Boston	(617) 555-5555

12 Highlight the consumer.

13 Click **OK**.

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




The **Add Care Recipient** dialog box contains the following fields:

- Care Recipient: Smith, Thomas
- Relationship To Care Recipient: Husband
- Family Caregiver Program Type: Federal
- Is At Risk For Abuse Or Neglect: Don't Know

Buttons: OK, Cancel, Add Next.

15 Click **OK**.

16 Click **Save**  to save the changes to the caregiver record.

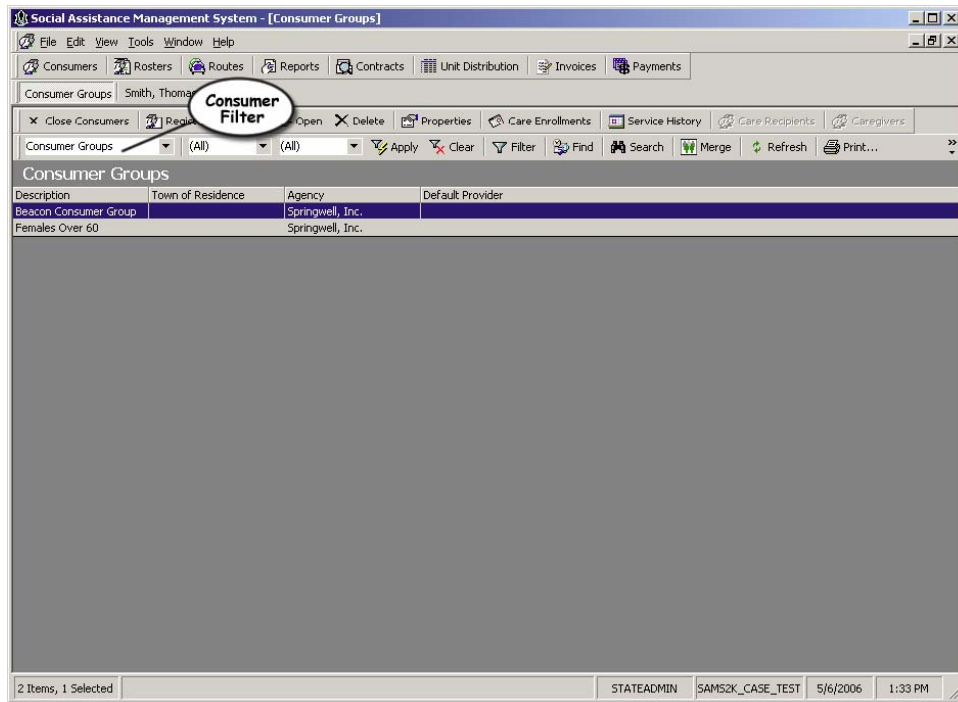
Entering Consumer Groups

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

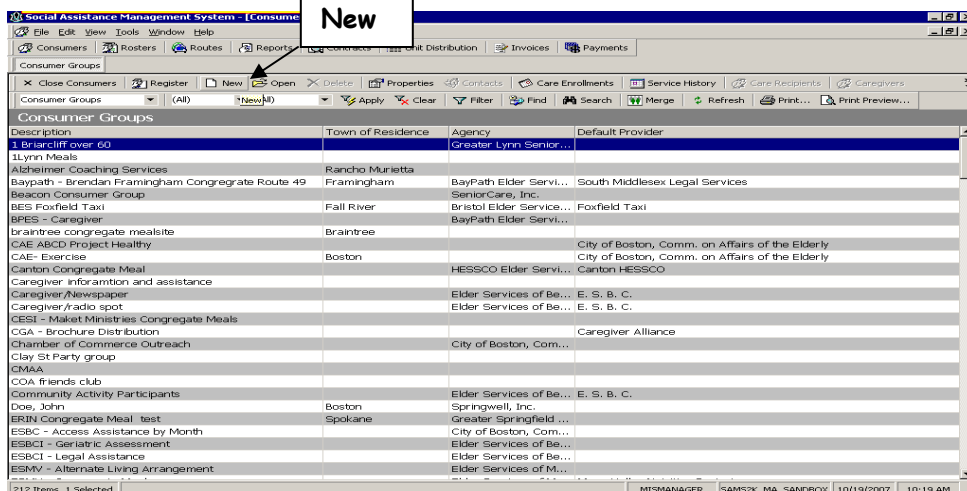
1 Click Consumers . 

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



3 Click New

Click New



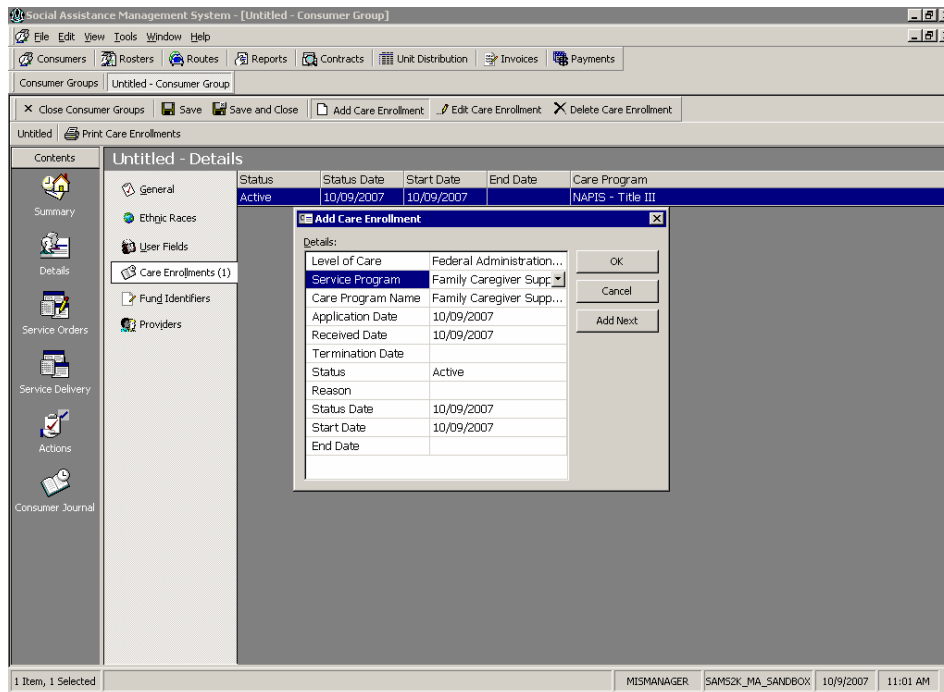
4 Use the description field to name the consumer group.

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.

Order No.	
Care Program Name	Family Caregiver Support Program...
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

Subservice	Ordered	Price	Cost	Delivered	Status	Reason
------------	---------	-------	------	-----------	--------	--------

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

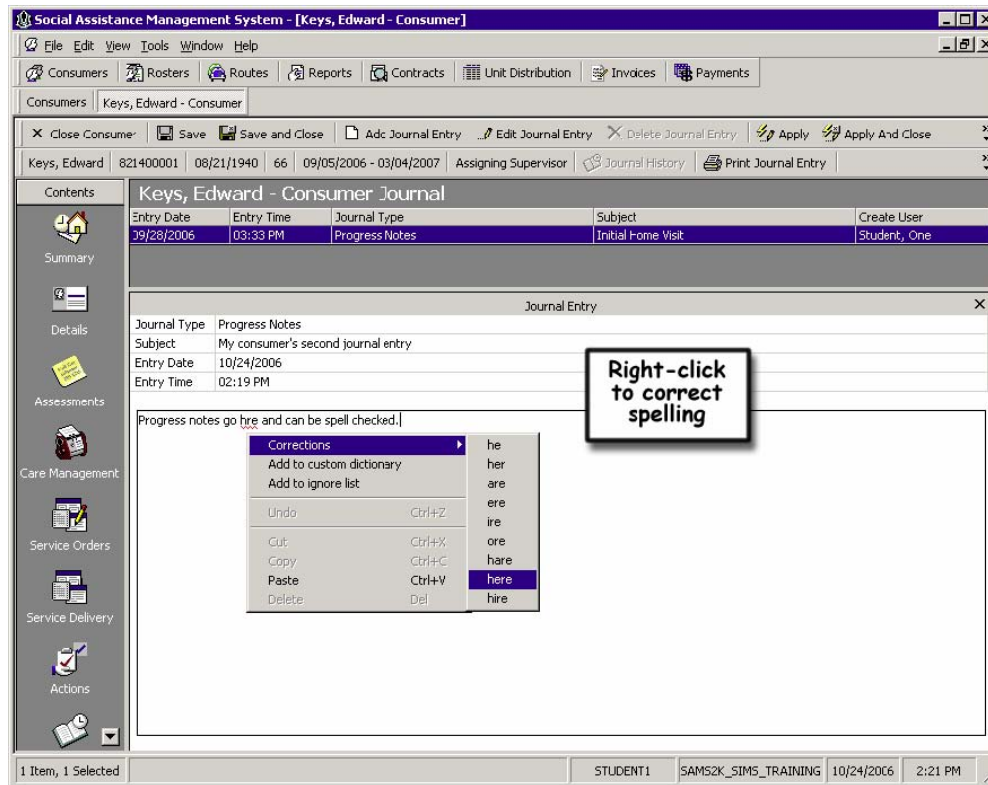
To add a general journal entry to a consumer

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

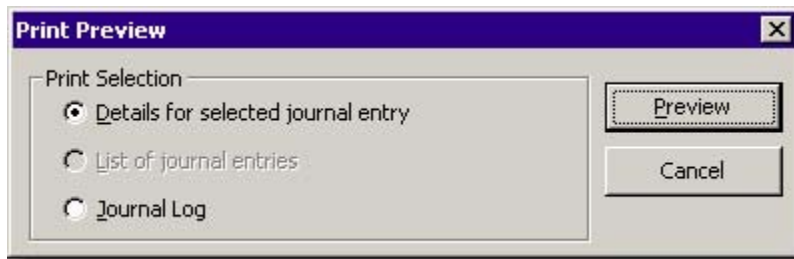
You can print a list of consumer journal entries, the details for any one journal entry, or a journal log. The journal log prints the entries you select in one report.

To print a consumer journal entry

18 Highlight the journal entry.

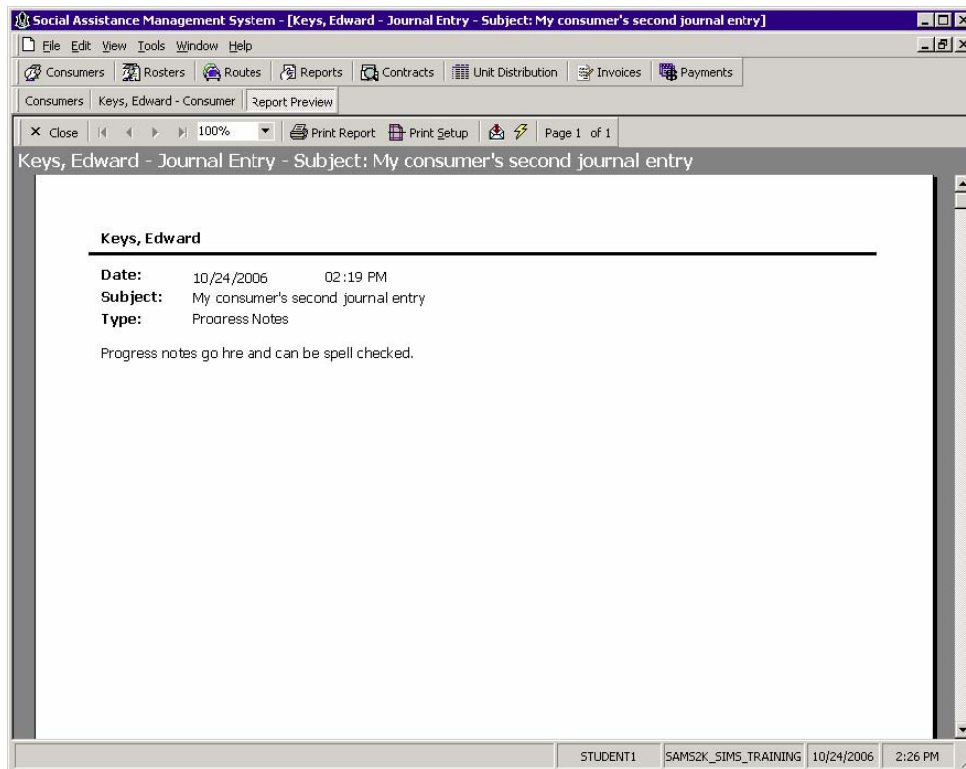
19 Click **Print Preview Journal Entry** .

-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.

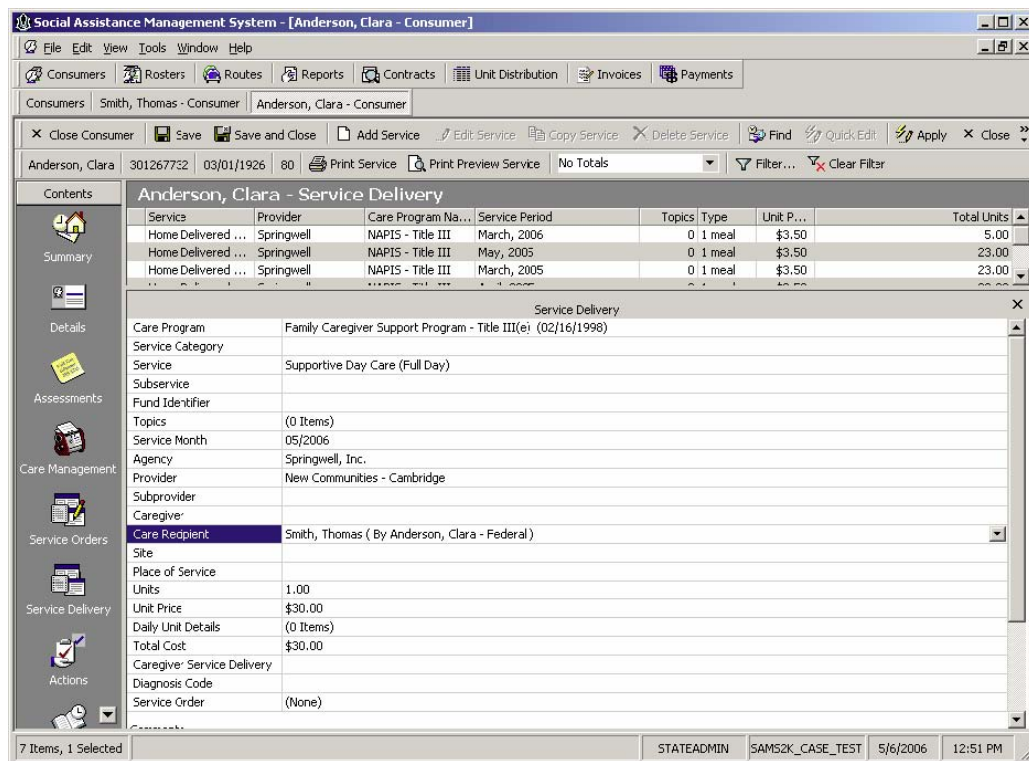
4 Double-click their record.

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

5 Click **Service Deliveries**.

6 Click **Add Service** .

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



The screenshot shows the SAMS interface with the 'Service Delivery' window open for 'Anderson, Clara - Consumer'. The window displays a table of service deliveries and a detailed view of the selected service.


Service	Provider	Care Program Na...	Service Period	Topics	Type	Unit P...	Total Units
Home Delivered ...	Springwell	NAPIS - Title III	March, 2006	0	1 meal	\$3.50	5.00
Home Delivered ...	Springwell	NAPIS - Title III	May, 2005	0	1 meal	\$3.50	23.00
Home Delivered ...	Springwell	NAPIS - Title III	March, 2005	0	1 meal	\$3.50	23.00

Service Delivery Details:

Care Program	Family Caregiver Support Program - Title III(e) (02/16/1998)
Service Category	
Service	Supportive Day Care (Full Day)
Subservice	
Fund Identifier	
Topics	(0 Items)
Service Month	05/2006
Agency	Springwell, Inc.
Provider	New Communities - Cambridge
Subprovider	
Caregiver	
Care Recipient	Smith, Thomas (By Anderson, Clara - Federal)
Site	
Place of Service	
Units	1.00
Unit Price	\$30.00
Daily Unit Details	(0 Items)
Total Cost	\$30.00
Caregiver Service Delivery	
Diagnosis Code	
Service Order	(None)

8 Select the *Care Recipient*.




9 Enter the *Units*.

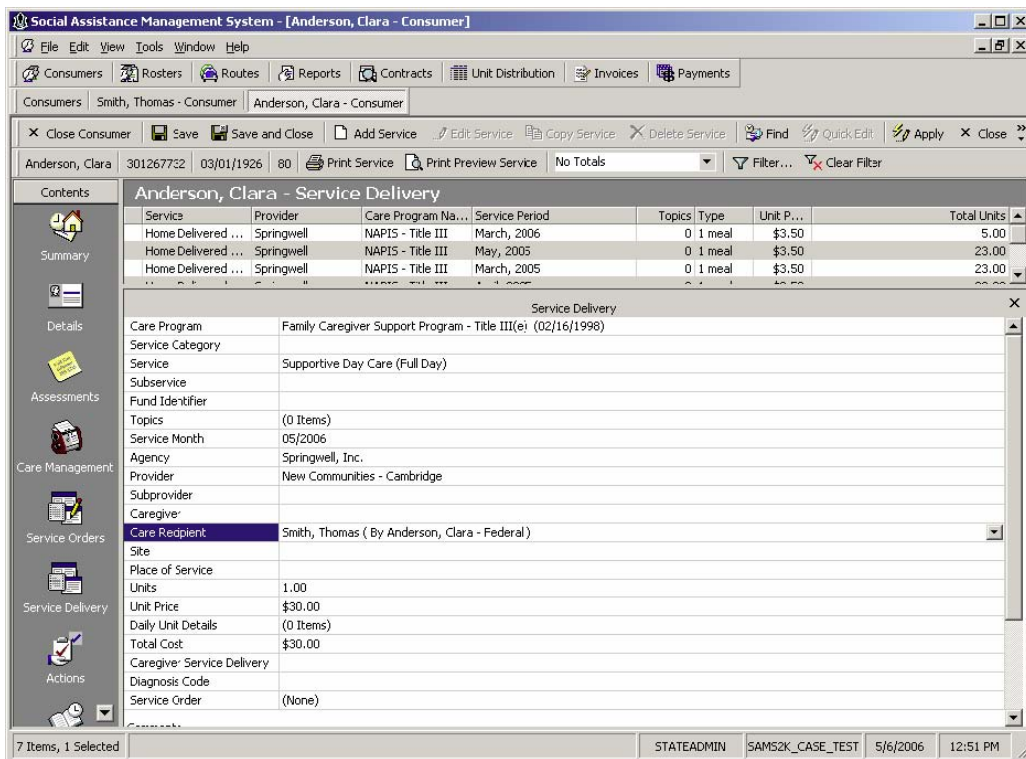
10 Click **Apply & Close** .

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*.



The screenshot shows the SAMS application window for 'Anderson, Clara - Consumer'. The 'Service Delivery' section is active, displaying a table of service delivery records. The table has columns for Service, Provider, Care Program Name, Service Period, Topics, Type, Unit Price, and Total Units. The records show three 'Home Delivered' services by 'Springwell' for 'NAPIS - Title III' in March 2006, each for 1 meal at \$3.50, totaling 5.00 units.

Service	Provider	Care Program Name	Service Period	Topics	Type	Unit Price	Total Units
Home Delivered ...	Springwell	NAPIS - Title III	March, 2006	0 1 meal		\$3.50	5.00
Home Delivered ...	Springwell	NAPIS - Title III	May, 2005	0 1 meal		\$3.50	23.00
Home Delivered ...	Springwell	NAPIS - Title III	March, 2005	0 1 meal		\$3.50	23.00

The 'Service Delivery' details window is also visible, showing the following information:

- Care Program: Family Caregiver Support Program - Title III(e) (02/16/1998)
- Service Category: Supportive Day Care (Full Day)
- Subservice: (0 Items)
- Fund Identifier: (0 Items)
- Topics: (0 Items)
- Service Month: 05/2006
- Agency: Springwell, Inc.
- Provider: New Communities - Cambridge
- Subprovider: (None)
- Caregiver: (None)
- Care Recipient: Smith, Thomas (By Anderson, Clara - Federal)
- Site: (None)
- Place of Service: (None)
- Units: 1.00
- Unit Price: \$30.00
- Daily Unit Details: (0 Items)
- Total Cost: \$30.00
- Caregiver Service Delivery: (None)
- Diagnosis Code: (None)
- Service Order: (None)

- 8 Select the *Care Recipient*.
- 9 Click on **Daily Unit Details**.

Social Assistance Management System - [Anderson, Clara - Consumer]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Anderson, Clara - Consumer

Close Consumer Save Save and Close Add Service Edit Service Copy Service Delete Service Find Quick Edit Apply Close

Anderson, Clara 1348095339 Unknown Unknown Print Service Print Preview Service Total on Service Filter... Clear Filter

Anderson, Clara - Service Delivery

Service	Provider	Care Program Name	Service P
Service Delivery			
Care Program	Family Caregiver Support Program - Title III(e) (01/18/2008) - Active		
Service Category	FCSP		
Service	Caregiver Counseling		
Subservice			
Fund Identifier			
Topics	(0 Items)		
Service Month	01/2008		
Agency	Franklin County Home Care Corporation		
Provider	Franklin County Home Care Corporation		
Subprovider			
Caregiver			
Care Recipient	Smith III, Paul Bradley J (By Anderson, Clara - Federal)		
Site			
Place of Service			
Units	1.00		
Unit Price	\$0.00		
Daily Unit Details	(0 Items)		
Total Cost	\$0.00		
Caregiver Service Delivery			
Diagnosis Code			
Service Order	(None)		

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

Social Assistance Management System - [Anderson, Clara - Consumer]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Anderson, Clara - Consumer

Close Consumer Save Save and Close Add Service Edit Service Copy Service Delete Service Find Quick Edit Apply Close

Anderson, Clara 1348095339 Unknown Unknown Print Service Print Preview Service Total on Service Filter... Clear Filter

Anderson, Clara - Service Delivery

Service	Provider	Care Program Name	Service P
Service Delivery			
Care Program	Family Caregiver Support Program - Title III(e) (01/18/2008) - Active		
Service Category	FCSP		
Service	Caregiver Counseling		
Subservice			
Fund Identifier			
Topics	(0 Items)		
Service Month	01/2008		
Agency	Franklin County Home Care Corporation		
Provider	Franklin County Home Care Corporation		
Subprovider			
Caregiver			
Care Recipient	Smith III, Paul Bradley J (By Anderson, Clara - Federal)		
Site			
Place of Service			
Units	2.00		
Unit Price	\$0.00		
Daily Unit Details	(2 Items)		
Total Cost	\$0.00		
Caregiver Service Delivery			
Diagnosis Code			
Service Order	(None)		

Daily Units

January 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

OK

11 Click OK.

12 Apply & Close .

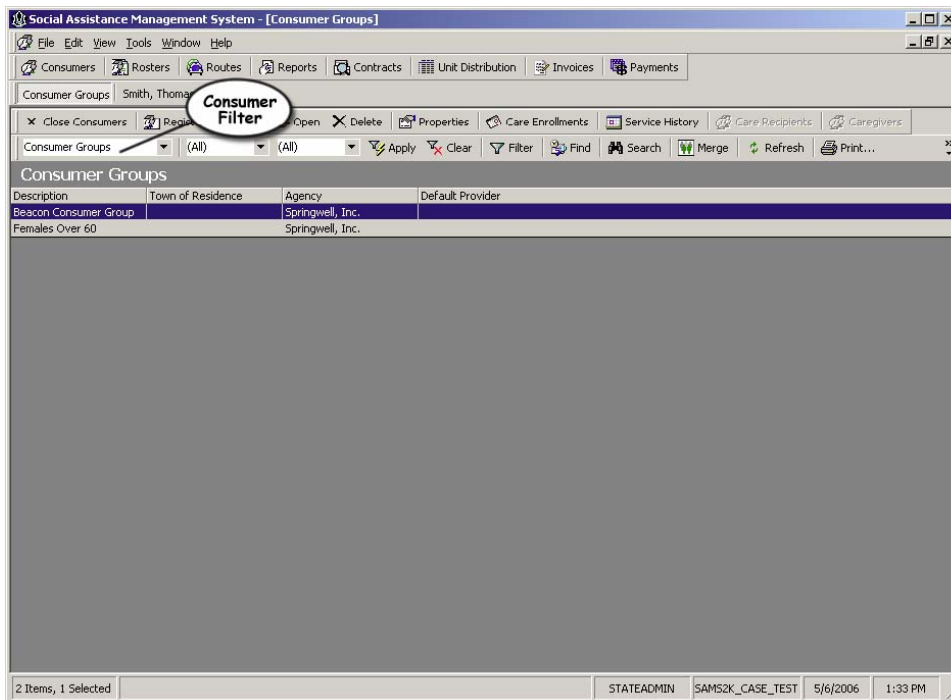
Recording Data for Consumer Groups

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	Topics 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.

Social Assistance Management System - [Untitled - SAMS Agency Summary Report]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Reports | Untitled - SAMS Agency Summary Report

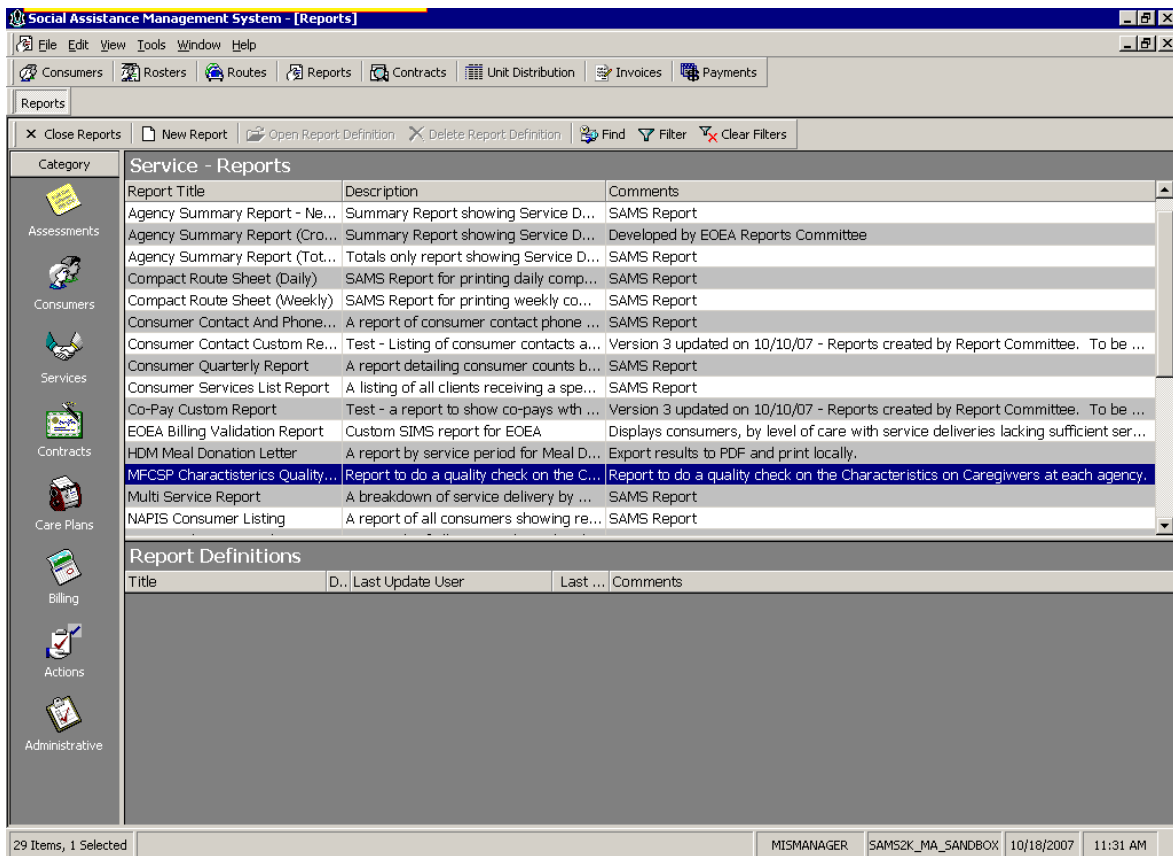
X Close Report Save Report Save and Close Report Save Report As ... Clear All Filters Print Report Printer Setup Print Preview Refresh Report

Untitled - SAMS Agency Summary Report

Report Title	Springwell - FCSP Agency Summary Report
Comments	
Description	This report can be run to see all the Family Caregiver Services delivered during a period of time.
Report	
Report Header	
Consumer Details	
Consumer Status	
NAPIS	
Residential Location	
Service Delivery	
Service Start Date (on or after)	08/01/2007
Service End Date (on or before)	08/31/2007
Agency	Springwell, Inc.
Provider	(Any)
Provider Role	(Any)
Subprovider	(Any)
Level of Care	(Any)
Service Program	Family Caregiver Support Program - Title III(e)
Care Program	(Any)
Care Program/Services	(Any)
Service Category	(Any)
Service	(Any)
Fund Identifier	(Any)
Place of Service	(Any)
Subservice	(Any)
Site	(Any)
Caregiver	(Any)
Advanced Filters	

MISMANAGER SAMS2K_MA_SANDBOX 10/10/2007 9:37 AM

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 MAFCSF 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.

-
- The screenshot shows the 'NAPIS SRT: SAMS Edition' application window. The 'Reports' menu item in the toolbar is highlighted with a red arrow. The status bar at the bottom indicates that 72 items are available, with 1 selected. The selected item is 'JLENIHAN' from the 'Executive Office of Elder Affairs (State Unit)'. The database file is 'S:\{NapisSRT}\NAPIS SRT.mdb' and the view is 'AMS2K_1'.

- NAPIS SRT: SMS Edition - Executive Office of Elder Affairs [9/1/2006-9/30/2006] - Print**

File Edit View Report Tools Window Help

Reports Mapping Options

Print Selected Sheets Export Active Sheet 53%

Previous Next Expand All Export Active Sheet Select All Deselect All

Executive Office of Elder Affairs [9/1/2006-9/30/2006] - Print

 - [-] Section I
 - [x] Section IA (Required)
 - [x] Section I.B
 - [x] Total Registered Clients (Clusters 1 and 2)
 - [x] Congregate Meals
 - [x] Nutrition Counseling
 - [x] Assisted Transportation
 - [x] Section I.C
 - [x] Total Cluster 1 Clients
 - [x] Chore
 - [x] Case Management
 - [x] Personal Care
 - [x] Home Delivered Meals
 - [x] Homemaker
 - [x] Adult Day Care/Health
 - [x] Section I.D
 - [x] Total Cluster 1 Clients
 - [x] Chore
 - [x] Case Management
 - [x] Personal Care
 - [x] Home Delivered Meals
 - [x] Homemaker
 - [x] Adult Day Care/Health
 - [x] Section I.E
 - [x] Section I.F
 - [x] Section II
 - [x] Section IIA (Required)
 - [x] Section IIB (Required)
 - [x] Section IIC (Required)
 - [x] Section IID (Required)
 - [x] Section IIE
 - [x] Section III
 - [x] Section IIIA (Required)
 - [x] Section IIIB (Required)
 - [x] Section IIIC (Required)

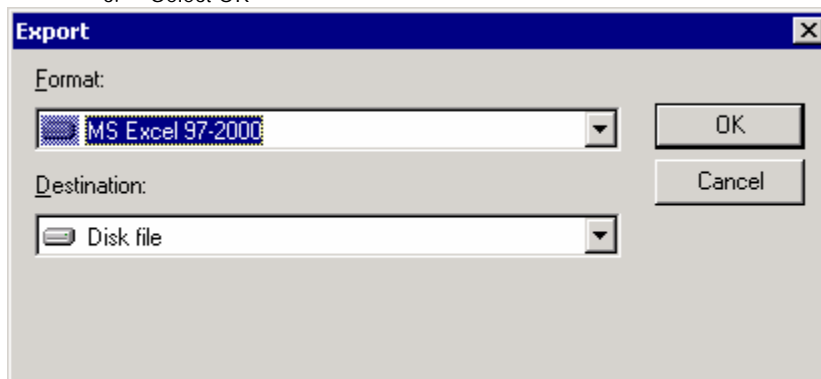
SECTION II. Elderly Client and Caregivers B. Summary Characteristics of Caregivers Serving Elderly Individuals (National Family Caregiver Support Program - Title II-B) State ID : MA Fiscal Year : 2006					
Caregiver Characteristics	All Caregivers	Age of the Caregiver			
		Under 25	Age 25-4	Age 45-64	Age 65+
Total Caregivers	22	0	2	0	0
Congregate Meal Programs	2	0	0	0	0
Expatriates	20	0	2	0	0
Female	18	0	2	0	0
Male	4	0	0	0	0
Race or Ethnicity	1	0	0	0	0
Elder	0	0	0	0	0
Rural Living	2	0	0	0	0
Caregiver City, Ethnicity					
Hopkinton, White	0	0	0	0	0
Brockton, White	15	0	1	0	0
Quincy, White	1	0	1	0	0
Caregiver City, Race or Ethnicity					
Worcester, Non-Hispanic	1	0	0	0	0
Totals Minorities					
Whiteland, Hispanic	0	0	0	0	0
Low Income, Native Island	0	0	0	0	0
Latin Island	0	0	0	0	0
Black or African American Island	0	0	0	0	0
Korean American or Other Pacific Islander Island	0	0	0	0	0
Pacific Islander Same as Other Race	0	0	0	0	0
Foreign Born, U.S. born or Foreign	0	0	0	0	0
Race or Ethnicity	18	0	2	0	0
Caregiver City, Religion					
Protestant	0	0	0	0	0
Wife	1	0	0	0	0
Spouse/Partner	0	0	0	0	0
Spouse/Partner/Child	10	0	0	0	0
Other Relative	0	0	2	0	0
Non-Relative	2	0	0	0	0
Relationship Unknown	0	0	0	0	0

Reported by: Bureau of Office of Elder Affairs
From Date: 09/01/2006 To Date: 09/30/2006

Page 20 of 25
Print Date: 09/15/2006

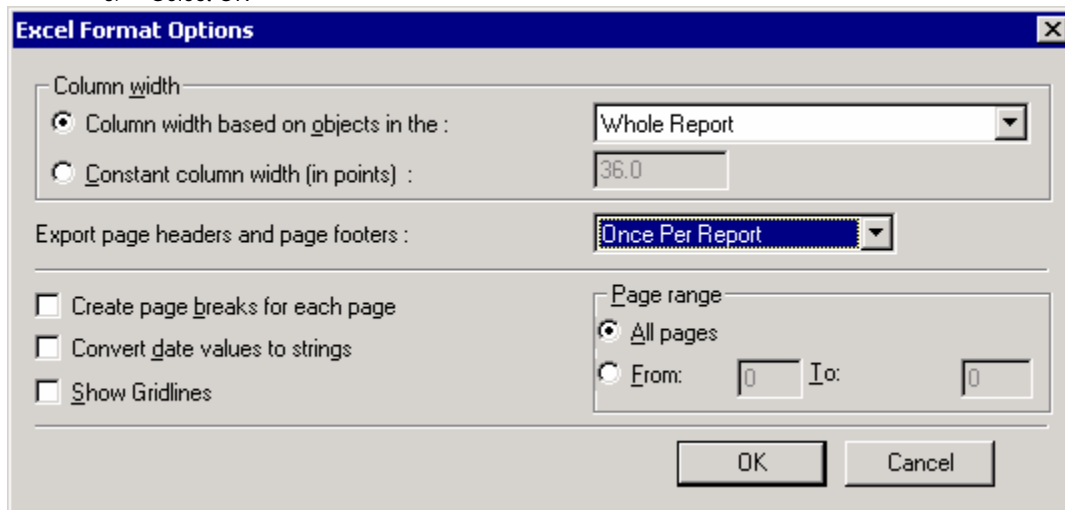
- 1/23/2008

- c. Select OK

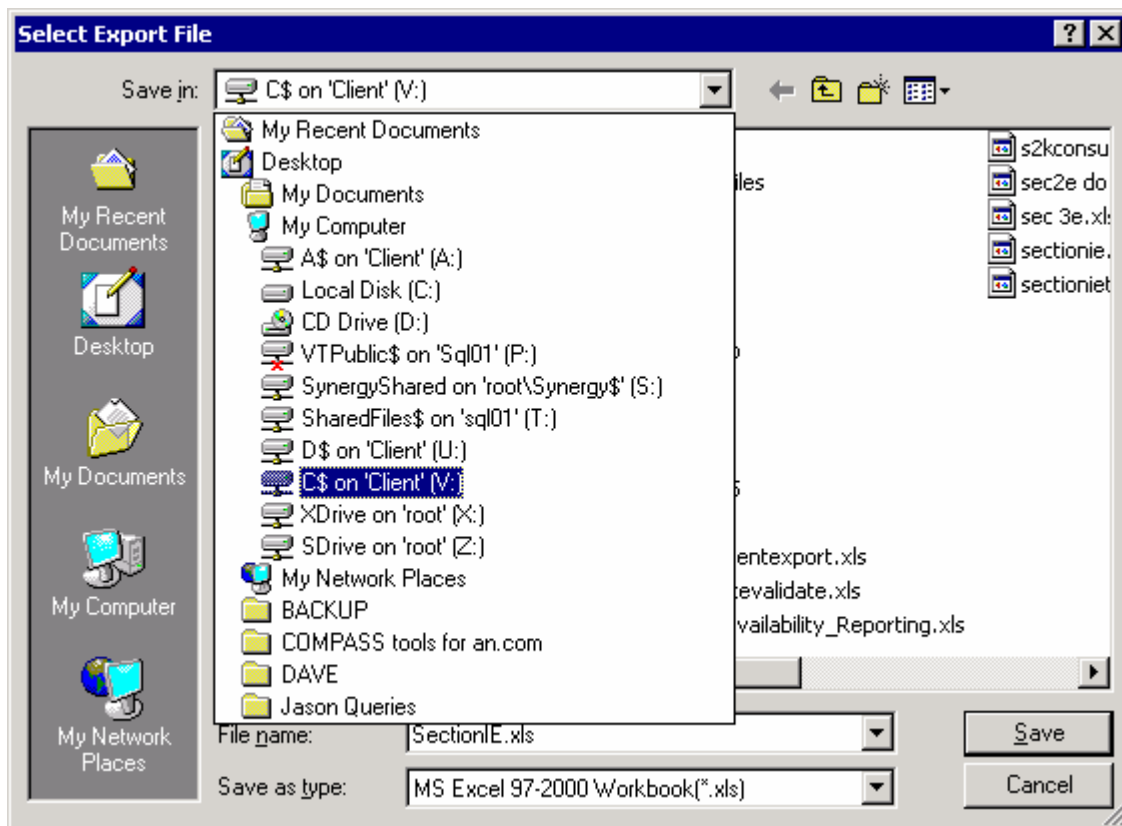


8. Export options

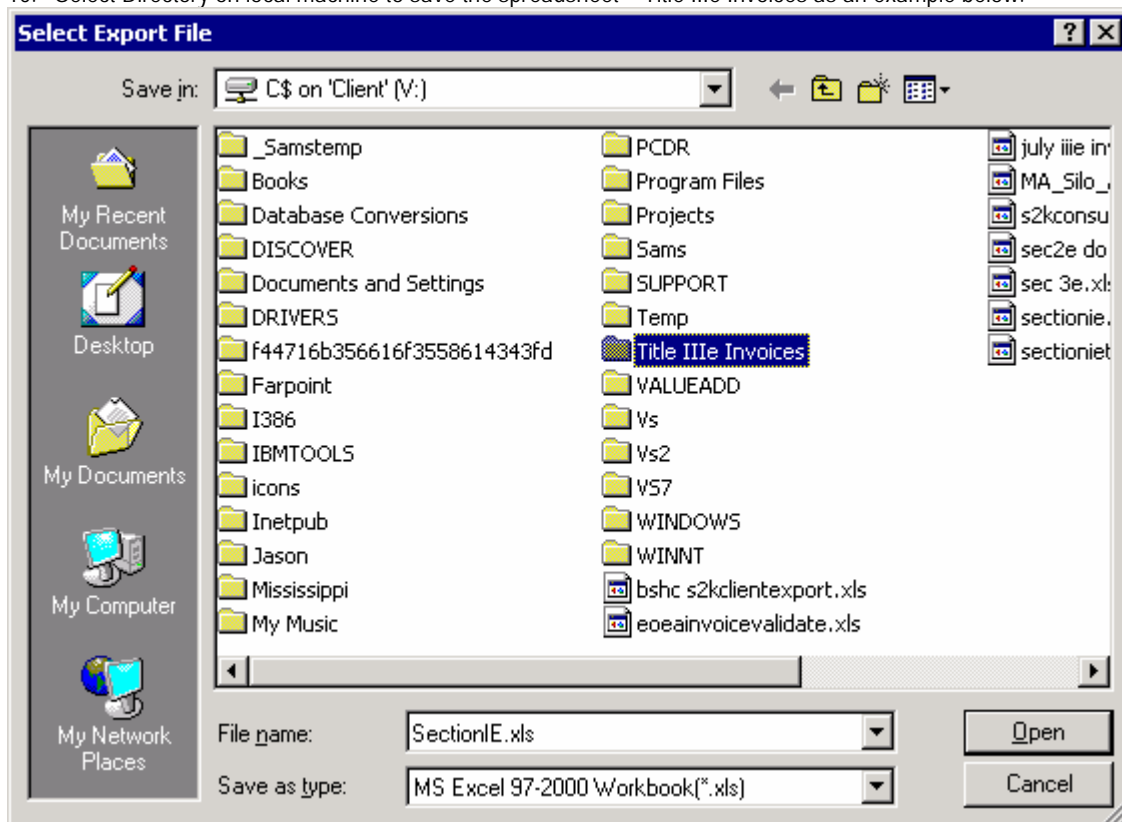
- a. Column width based on objects in the "Whole Report"
- b. Export Page Headers and Page Footers "Once Per Report"
- c. Select OK



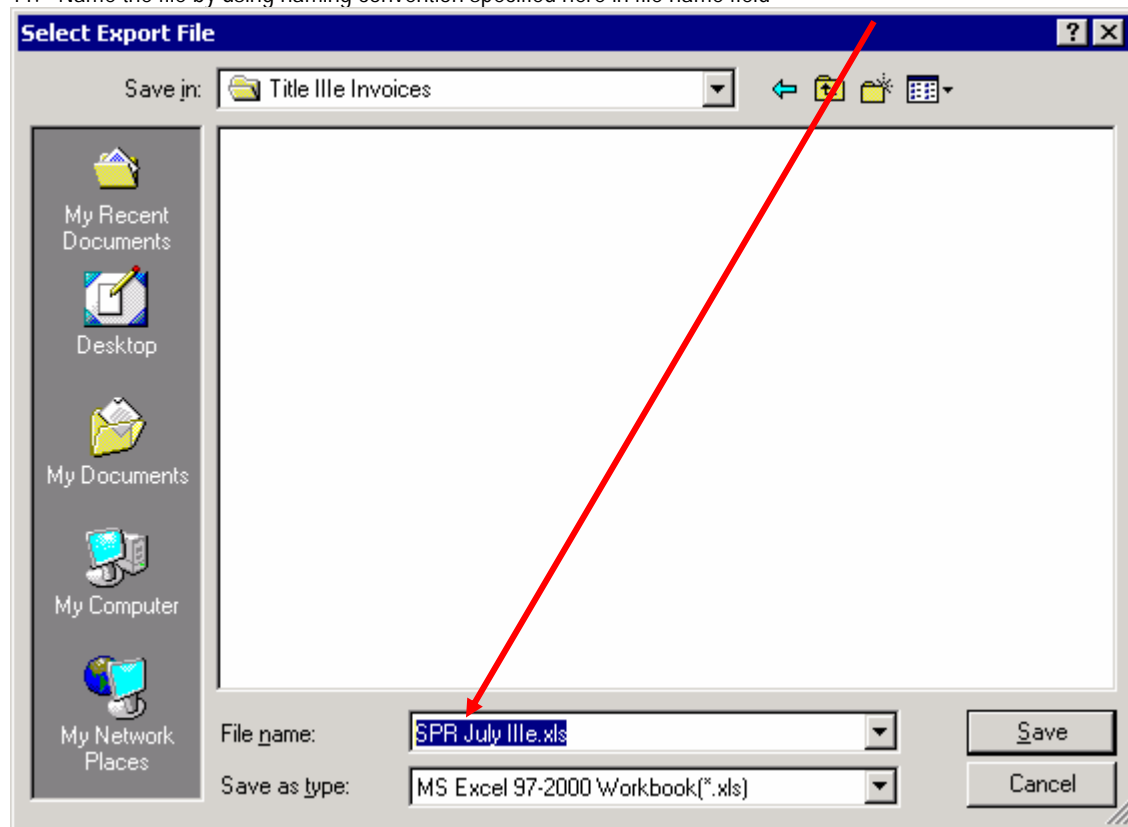
9. Export to the local users C: drive, which is the Network V: (We already have documentation on using the V: drive as the local C: which we can use here.)



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



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.

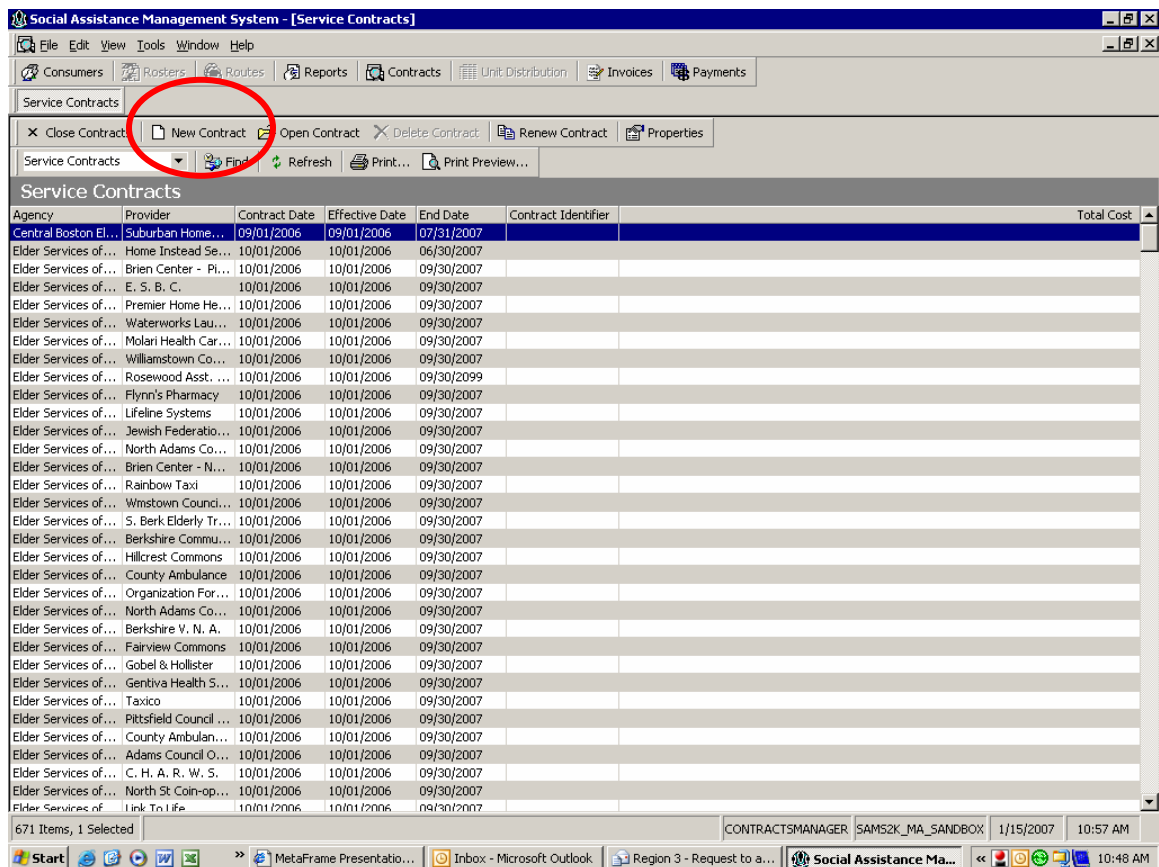
17. Repeat steps 5-14 choosing NAPIS report section II.C.

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.

Social Assistance Management System - [Untitled - Service Contract]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Service Contracts Untitled - Service Contract

Close Contract Save Save and Close

Unknown Unknown Unknown Print Contract Print Preview Contract

Untitled - Contract Details

Contents

Details

Items

Description

Agency

Provider

Contract Date

Effective Date

End Date

Contract Identifier

Notes

CONTRACTSMANAGER SAMS2K_MA_SANDBOX 1/15/2007 10:58 AM

Start MetaFrame Prese... Inbox - Microsoft... Region 3 - Reque... Social Assistan... Document1 - Micr... 10:49 AM

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.

Social Assistance Management System - [Untitled - Service Contract]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

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

Close Contract Save Save and Close

Unknown Unknown Unknown Unknown Print Contract Print Preview Contract

Contents

- Details
- Items**

Coastline Elderly Services, Inc. - Contract Details

Description	Coastline Elderly Services, Inc.
Agency	Coastline Elderly Services, Inc.
Provider	Coastline Elderly Services, Inc.
Contract Date	10/01/2007
Effective Date	10/01/2007
End Date	09/30/2008
Contract Identifier	

Notes

MISMANAGER SAM52K_MA_SANDBOX 10/4/2007 3:52 PM

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

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 Apply and Close

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

Coastline Elderly Services, Inc. - Contract Items

Subservice	Fund Identifier	Unit Price	Contract...	Contracte...	Delivered ...	Delivered ...	Open Order ...	Open Order ...	Units Remain...
Contract Item									
Line Item Identifier									
Service									
Fund Identifier									
Subservices	(0 Items)								
Subproviders									
Unit Price	\$0.00								
Billing ID									
Enforce Limits	No								
Maximum Units									
Contract Item Cost (Maximum)									
Ordered Units	(New)								
Ordered Cost	(New)								
Delivered Units	(New)								
Delivered Cost	(New)								
Comments									

0 Items MISMANAGER SAMS2K MA SANDBOX 10/4/2007 3:56 PM

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.

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 Apply and Close

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

Contents Details Items

Coastline Elderly Services, Inc. - Contract Items

Subservice	Fund Identifier	Unit Price	Contract...	Contracts...	Delivered ...	Delivered ...	Open Order ...	Open Order ...	Units Remain...
Contract Item									
Line Item Identifier	Service	Caregiver Counseling							
Fund Identifier									
Subservices	(0 Items)								
Subproviders	(0 Subproviders)								
Unit Price	\$0.00								
Billing ID									
Enforce Limits	No								
Maximum Units									
Contract Item Cost (Maximum)									
Ordered Units	(New)								
Ordered Cost	(New)								
Delivered Units	(New)								
Delivered Cost	(New)								
Comments									

0 Items MISMANAGER SAMSOK MA SANDBOX 10/4/2007 3:58 PM

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 Apply and Close

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

Contents

Coastline Elderly Services, Inc. - Contract Items

Fund Identifier	Unit Price	Contract...	Contracts...	Delivered ...	Delivered ...	Open Order ...	Open Order ...	Units Remain...	Dollars Rema...
Caregiver Counseling									
(None)	\$0.00								

Contract Item

Line Item Identifier	
Service	Caregiver Support Group
Fund Identifier	
Subservices	(0 Items)
Subproviders	(0 Subproviders)
Unit Price	\$0.00
Billing ID	
Enforce Limits	No
Maximum Units	
Contract Item Cost (Maximum)	
Ordered Units	(New)
Ordered Cost	(New)
Delivered Units	(New)
Delivered Cost	(New)
Comments	

Contract Item - Confirm Save

Would you like to apply changes made to this contract item?

Yes No Cancel

0 Items

MISMANAGER SAMS2K_MA_SANDBOX 10/4/2007 4:02 PM

Start » Inbox - Microsoft Office Outlook 3 Microsoft Office Word MetaFrame Presentation Social Assistance Management System SAMS Administrator 3:58 PM

Appendix 2 – Massachusetts Family Caregiver Support Program – Service List