On October 31st, 2007, EOEA authorized select agency users the system access rights to process rate change requests directly through SAMS Administrator. This tool allows for bulk rate changes based on user specified parameters.

When to Use the Rate Change Wizard

The Rate Change Wizard is primarily used when you have renegotiated a contract rate with a vendor (including any necessary rates changes that are established by the Executive Office of Elder Affairs).

Example: Your ASAP has a contract with a vendor that runs until 5/31/2008 where the negotiated rate for the service "Homemaker" was $5.00 a unit, and your Care Managers and users have been entering service plans and generating service orders against this contract. If you renegotiate the rate with this vendor to $5.25 for the service Homemaker starting December 1st, 2007, you will need a way to update any existing service records that were created under the original contract but that fall within the date range of the new contract.

Staff at ASAPs would need to close the existing contract and create a new contract with this vendor. In addition, you would also want to update any existing service records that were created based on the old rate that fall within the time frame of the new contract.

The Rate Change Wizard is used to edit the rate for existing service records (service orders, service deliveries, and/or care plans) in bulk.

Using the Rate Change Wizard

1) To access the Rate Change Wizard, please open SAMS Administrator and click on Tools>Change Rate.
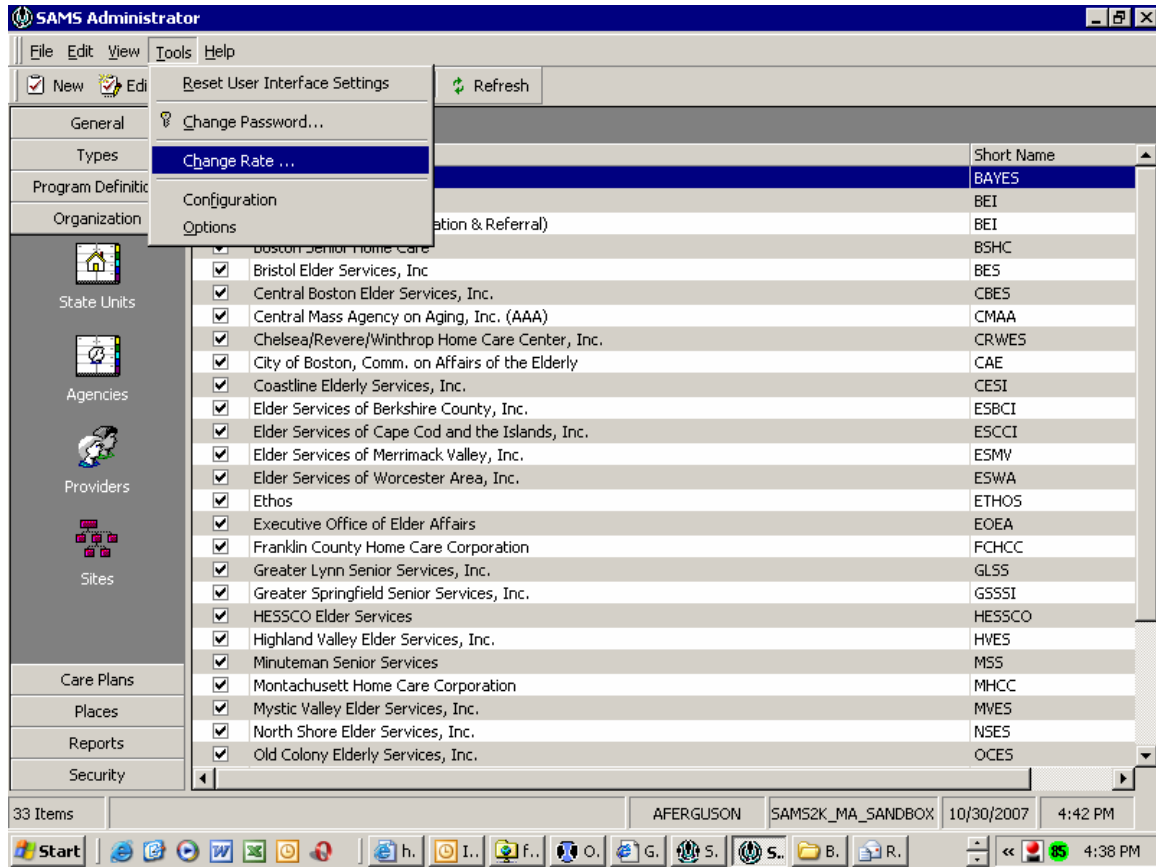
This will open a Pop-Up box that allows you to specify the records that you wish to update. You can select any combination of the three choices: Service Order, Service Delivery, Care Plan.
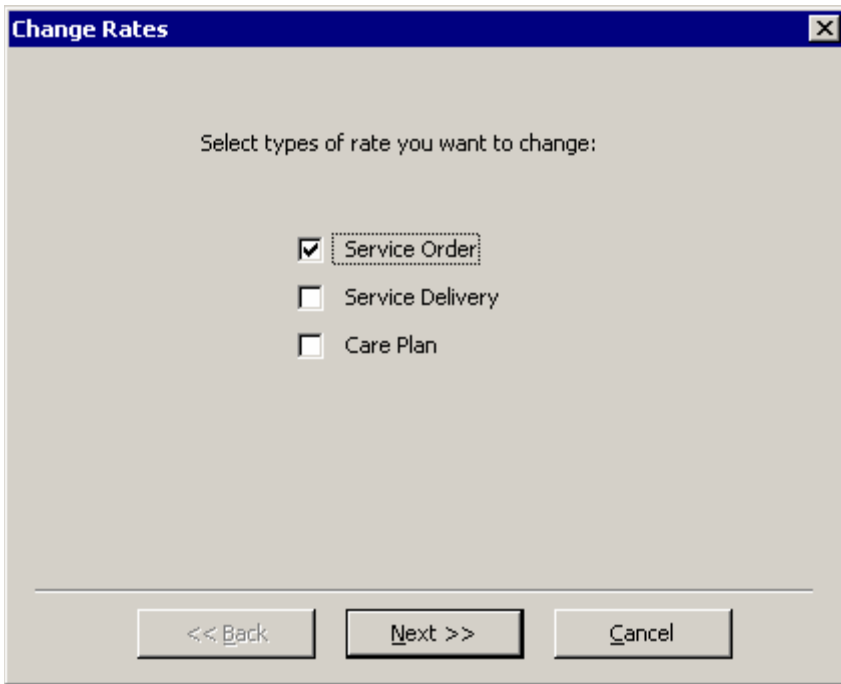
2)   From the pop-up box, make the appropriate selections to indicate the type of service records you wish to change and then click "Next."

The Rate Change Wizard will show a list of "**Required**" and "**Optional**" fields. You must enter data for each of the "Required" fields. You may enter data for the Optional fields to specify the records that will be changed.

Each of these fields will only allow for one selection. If you wish to update the rate for both services, Homemaker and Personal Care, you would need to process two separate requests, one for Homemaker and one for Personal Care.

The Required Fields in the Rate Change Wizard are as follows:

- Agency
- Service
- Date (On or After)
- Date (On or Before)
- New Rate

The Optional Fields in the Rate Change Wizard are as follows:

- Care Program
- Provider
- Subprovider *
- Fund Identifier *
- Include Consumer Group (Yes or No)
- Old Rate

These fields are not being used with the current Massachusetts set up - 10/31/2007

Please note that the Provider field is Optional. In most cases, you will want to designate a provider when processing a rate change. Failure to indicate the provider will result in rates being updated for all matching service records from your agency regardless of the provider. The only time you would not select a provider when processing a rate change is when the new rate is being applied universally to all providers.

The Old Rate field allows you to update only the service records that exist with the matching rate. If you leave the Old Rate field blank, the wizard will update all matching records.

3)   Make the appropriate choices to establish the records that you want updated and click "Next."

In the example below, Mystic Valley is processing a rate change to update all service orders for the Service = Homemaker, Provider = Joe's Garage, from 11/2007 through 12/2010, from an old rate of $5.00 to a new rate of $5.50.

The Rate Change Wizard will display a count of updated records based on the parameters you have selected.
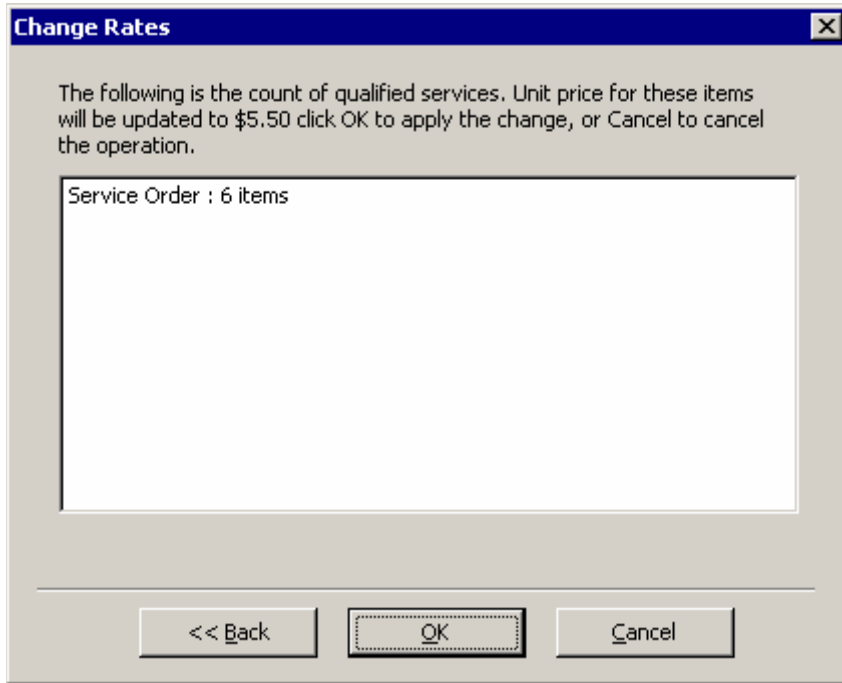
4)   Review the count of records that will be updated. If changes are needed, click on the "Back" button to modify the parameters you had selected. If the count looks accurate, click "OK" and the system will update the rates for the matching service records.

The system will process your request and provide a count of updated records.
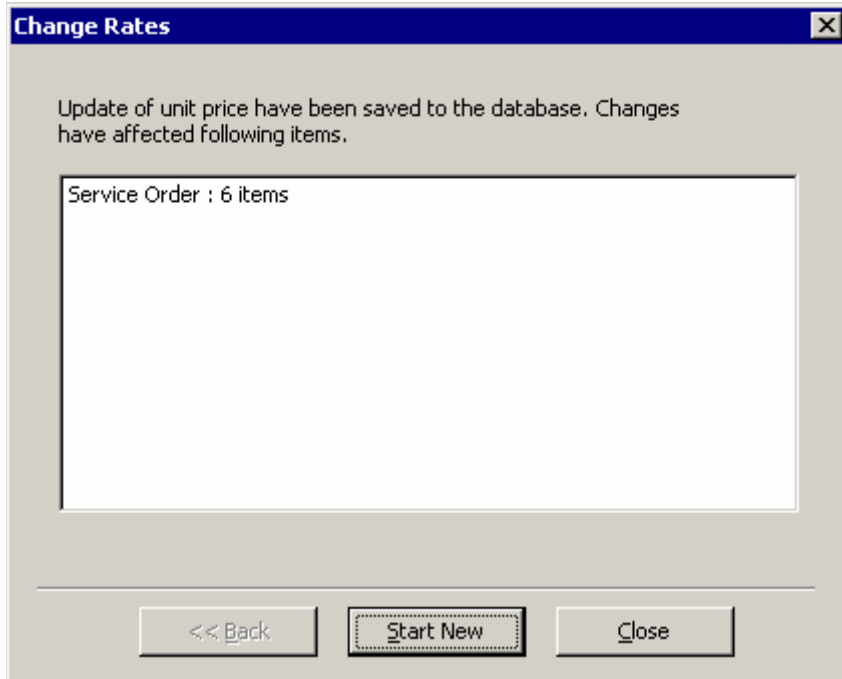
You can click on "Start New" to process another Rate Change Request.

Tips for Using the Rate Change Wizard

- The date parameters for rate changes are by month and year only. If you do not know how far in advance your service records cover, you can enter an end date for your request many years into the future (such as the year 12/2055).
- Only records that start and end within the specified dates will be updated. You may find many examples where a consumer's service orders are updated to a new rate but the consumer's service plan is not updated to the new rates. This happens often when an existing service plan starts prior to the rate change start date.
- The Rate Change Wizard matches SAMS organizational security. If a user is associated with an agency in SAMS, they will only be authorized to process rate changes for that same agency. For example, a Springwell user can not update rates for Mystic Valley service orders.
- If you wish to update rates for every Care Program except for NAPIS – Title III, the easiest process will be to process a rate change for all care programs, and to then process a second rate change specific to care program NAPIS – Title III to change those rates back to their original amount.
- There is a potential issue if a user is generating a service order matching your Rate Change request while you are processing the Rate Change. We would recommend processing rate changes during off hours or at a time when your users are not entering new service records matching the Rate Change parameters.
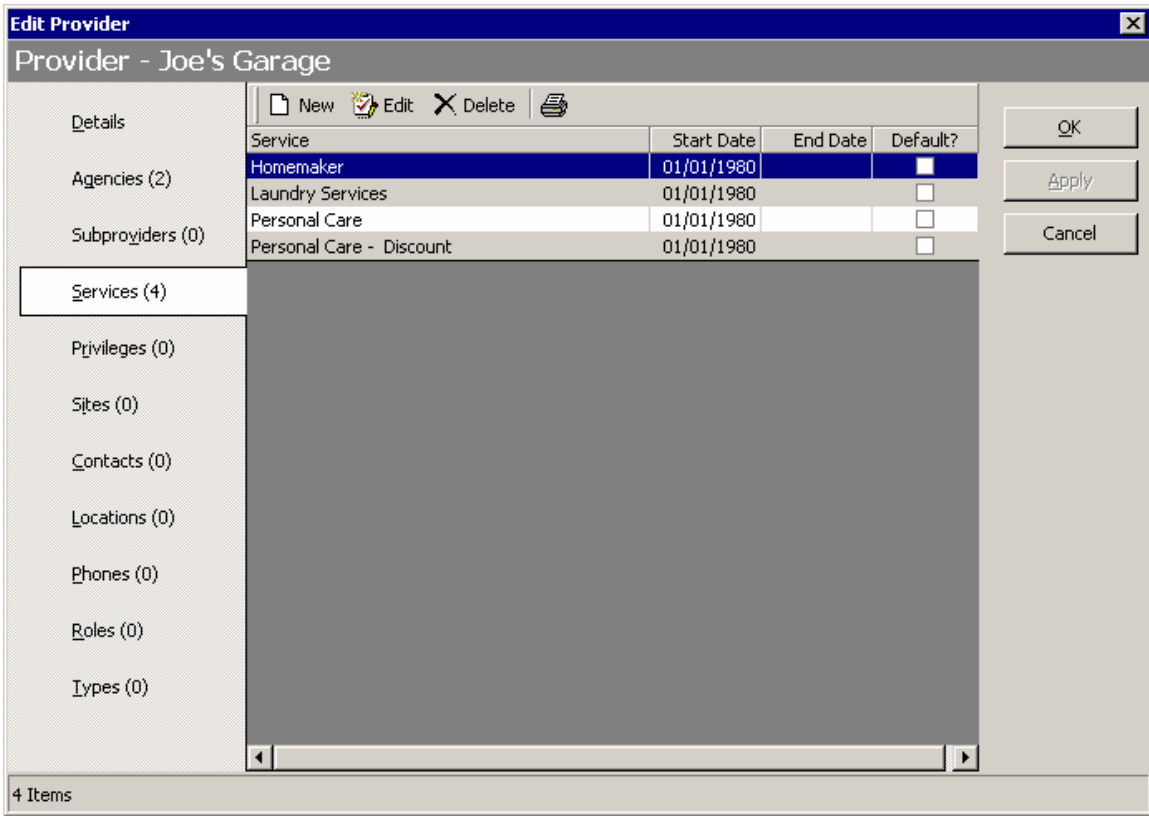
Caution: Security Concerns (What Not To Do)

In order to grant agency users the access rights in SAMS Administrator to update service record rates through the Rate Change Wizard, we also had to grant your users the rights to update provider record service associations. While you can edit provider service associations, you must **NEVER MAKE CHANGES TO A PROVIDER RECORD**.

Agency users can open and view the SAMS Administrative Structure through the SAMS Administrator application. This includes the ability to see which services are authorized under which service programs. Please feel free to read and review the administrative structure. Users will also be able to view providers and users that are associated with their agency.

If you have access to run the Rate Change Wizard, you will also have access to make slight changes to the provider record, by opening the Provider Record, clicking on Services, selecting a service and clicking Edit.   No agency users should ever make changes to a Provider records through SAMS Administrator.

Again, no agency users should edit a provider record in SAMS Administrator. Changes to the Administrative Structure should only be made by EOEA staff.

If you make an edit to a provider record by mistake, please contact SIMS Support immediately by calling 617-222-7587.