SAMS 1.8 is the latest and greatest revision of SAMS, the SIMS consumer management system. There is new functionality in the system, including a change to the manner in which the Social Security interacts with the Consumer ID and Journal Security. There is a notable performance enhancement to the consumer list called Paging as well. The Service Delivery Confirmation Wizard new functionality allows users to quickly deliver services to consumers across multiple enrollments and is a confirmation based model where the consumers' planned services are displayed in the Wizard, and then entered directly as a service delivery unless changed. This can be used for all types of planned services, not just nutrition.

I. Service Delivery Confirmation Wizard – Case Managed consumers are already ready for the confirmation wizard. They have service plans and orders that make them eligible for delivery through the confirmation tool. It is only a matter of managing the consumers. If they are managed properly the tool will work.

The service delivery confirmation wizard is currently accessible under the Tools menu. In SAMS go to Tools→ Delivery Confirmation Wizard. This tool is also available from the Toolbar in the Route section of SAMS by using the Confirm Delivery button. This would be used in the case where the delivery should match the route listing in order to expedite the delivery process in the system. When you select the confirm Delivery from the route it pre-populates the organization information ensuring that the route attributes are a part of the data to be written in the wizard.

The initial screen in the Wizard looks like this:

When users choose the Tools→ Delivery Confirmation Wizard method they will be required to select from the following options. This selection is the same data elements used to create the roster and route definitions today.

- Based on: This option allows the user to use the confirmation wizard based on either the existing service orders for a consumer or for service plans.

- Agency: When the form first comes up it defaults to the user's defined 'Default Agency' preference under Tools→ Options. This form obeys security for Service Delivery in that Organization and the Can Create Service Delivery settings. So, a user associated with their agency only can create records.

- Provider: Select the Provider Organization that delivers the service. This must be an organization that is associated with the selected agency. This is an important selection as it properly designates the service to those that provide it. The service list will be filtered as well.

- Subprovider: The selection of a subprovider allows the detail of the record to be narrowed down to the fine level of subprovider and thus the units associated will be for the subprovider.

- Site: Like the subprovider, the service delivery can be delivered to a site.

- Route selection – The selection of a route will automatically ensure that deliveries occur to those consumers that appear on the route. Selecting the route pre-populates the organization information (Agency, Provider, etc.).

- Service/Subservice: The selection of service determines which of the services offered by the provider should be delivered in the confirmation set. Note that multiple services can be selected here. This list is populated by items in a contract for the provider and agency. If there is no contract present the list is populated based on the provider menu in the SAMS Administrator.
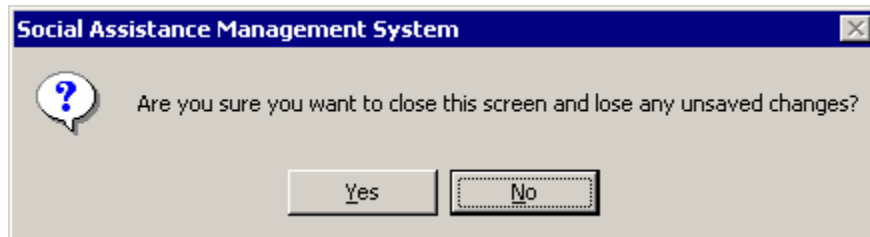

Inc?	Service	Subservice
☐	Companion	(None)
☐	Home Health Aide	(None)
☐	Homemaker	(None)
☐	Homemaker - Discount	(None)
☐	Homemaker - Premium	(None)
☑	Personal Care	(None)
☐	Personal Care - Discount	(None)
☐	Personal Care - Premium	(None)
☐	Skilled Nursing Services	(None)
☐	Supportive Home Care Aide	(None)
☐	Supportive Home Care Aide	Attendant Care
☐	Supportive Home Care Aide	Home Health
☐	Supportive Home Care Aide	Homemaker
☐	Supportive Home Care Aide	Personal Care
☐	Transportation Rate 1 (1-way trip)	(None)

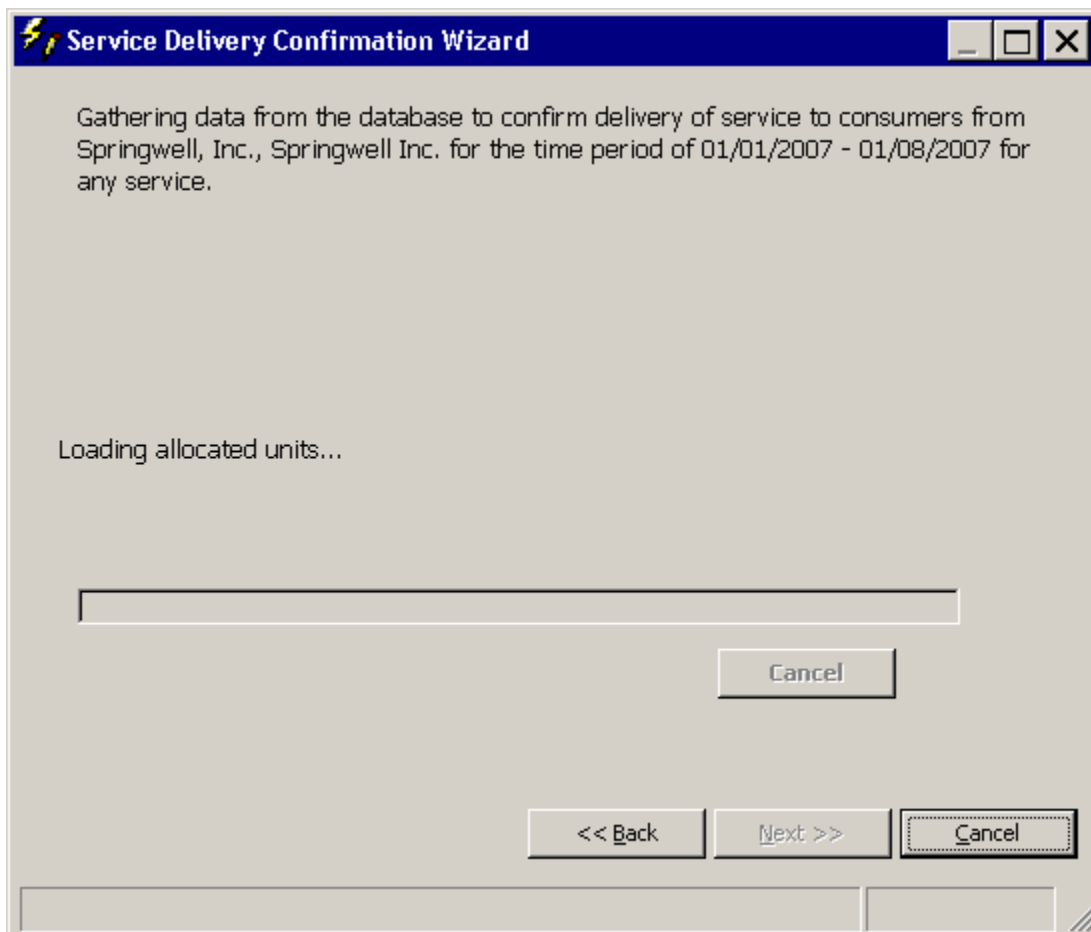(All) AB CD EF GH IJ KL MN OP QR ST UV WX YZ

OK
Select All
Deselect All
Cancel
☐ Selected items only

- Dates: The service dates can be for 1 day, a week or any time period up to 1 month within the same service period.

- Cancel the Confirmation Set.
  - o You can cancel the wizard at any point to prevent the writing of units to the database. The following message will appear.

Social Assistance Management System

? Are you sure you want to close this screen and lose any unsaved changes?

[Yes]   [No]

- Next button to advance in the wizard.
  - o Upon hitting next, the user will get a screen that indicates the request information is being gathered.

Service Delivery Confirmation Wizard

Gathering data from the database to confirm delivery of service to consumers from Springwell, Inc., Springwell Inc. for the time period of 01/01/2007 - 01/08/2007 for any service.

Loading allocated units...

[Cancel]

[<< Back]   [Next >>]   [Cancel]

* As soon as this completes the data entry screen will open.

- Data Entry Screen in Confirmation Wizard.
  - o This is the section in the Wizard where the data is confirmed. If there are no exceptions, and the consumers are all receiving their planned services as dictated through their service schedules then the work is complete.
  - o If there are exceptions, then the user simply changes the planned data to correctly account for the ACTUAL delivered services.

Service Delivery Confirmation Wizard

Show/Hide Columns | Suppress Zero Units | Hide Weekend

Thursday, 2/1 - Saturday, 2/3 | 2/4 - Thursday, 2/8 | **All Weeks**

I	Seq	Client ID	Name	Service	Subservice	Pla...	Session	Unit Price	Thu 1	Fri 2	Sat 3	Sun 4	Mon 5	Tue 6	We
	1	1300019...	Guest130...	HDM Meal ...	Puree LWFT	2.00	**2.00**	$6.00							2.
	1	1300019...	Guest130...	HDM Meal ...	Puree LWHT	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	2	1300009...	Guest130...	HDM Meal ...	Regular 1 L...	0.00	0.00	$5.50							
	3	1300026...	Guest130...	HDM Meal ...	Regular HCR	3.00	**3.00**	$6.00		1....			1.00		1.
	4	1300034...	Guest130...	HDM Meal ...	Regular HCR	3.00	**3.00**	$6.00		1....			1.00		1.
	5	1300053...	Guest130...	HDM Meal ...	Regular HCK	6.00	**6.00**	$7.00	1.00	1....			1.00	1.00	1.
	6	1300049...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	7	1300019...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	8	1300026...	Guest130...	HDM Meal ...	Regular HCR	3.00	**3.00**	$6.00	1.00					1.00	
	9	1300027...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	10	1300003...	Guest130...	HDM Meal ...	Regular HCK	3.00	**3.00**	$7.00	1.00					1.00	
	11	1300040...	Guest130...	HDM Meal ...	Regular 1 L...	6.00	**6.00**	$5.50	1.00	1....			1.00	1.00	1.
	12	1300019...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	13	1300055...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	14	1300047...	Guest130...	HDM Meal ...	Modified L...	6.00	**6.00**	$5.50	1.00	1....			1.00	1.00	1.
	15	1300003...	Guest130...	HDM Meal ...	Regular HCR	4.00	**4.00**	$6.00	1.00	1....				1.00	
	16	1300024...	Guest130...	HDM Meal ...	Cardiac LW...	0.00	0.00	$6.00	S	S	S	S	S	S	
	17	1300052...	Guest130...	HDM Meal ...	Modified HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	18	1300041...	Guest130...	HDM Meal ...	Regular HC...	2.00	**2.00**	$6.00						2.00	
	18	1300041...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
	19	1300044...	Guest130...	HDM Meal ...	Regular HCK	6.00	**6.00**	$7.00	1.00	1....			1.00	1.00	1.
	20	1300007...	Guest130...	HDM Meal ...	Regular 1 L...	6.00	**6.00**	$5.50	1.00	1....			1.00	1.00	1.
	21	1300012...	Guest130...	HDM Meal ...	Regular HCK	6.00	**6.00**	$7.00	1.00	1....			1.00	1.00	1.
	22	1300005...	Guest130...	HDM Meal ...	Regular HCK	0.00	0.00	$7.00							
	23	1300023...	Guest130...	HDM Meal ...	Regular HCR	6.00	**6.00**	$6.00	1.00	1....			1.00	1.00	1.
			Total			11...	110.00		18....	1...	0.00	0.00	17....	20....	19.

<< Back | Save | Cancel

* The demonstration here shows the items that are setup for weekly service schedules with the actual planned days.

* This form can be resized by maximizing or dragging the form's edge. There is also the standard Windows Minimize/Maximize/Restore and Close buttons.

Functionality in the Confirmation Wizard Data Entry Screen-
- Type ahead ability works on both client id and name and service allowing for a consumer to be found quickly and easily in the confirmation set. Simply click on a name in the name column and start typing in the last name of the consumer. It will highlight as you go.
- Weekly tabs – these allow you to manage the data effectively by week, or for all weeks in the confirmation session by selecting the appropriate tabs. Above you can see All Weeks selected.

  Each row shows the consumer that is eligible to receive the service in the time period specified. Users can sort by any column by clicking on the column heading.
  Elements in the Confirmation columns are:

- I (Info) – this shows the status of the consumer on the Wizard. The icon on the left hand side with the red x represents lines associated with one or more service suspensions. You can see the suspensions indicated in the Delivery Dates with a Red S as well.
- Route Sequence Sorting - The default is the order of the delivery from the route management. The columns can be selected to sort the data by that element as well without losing the route sequence numbers.
- Client ID – This is the ID of the consumer that you are delivering services for.
- Full name - This is the name of the consumer that you are delivering services for.
- Service – This is the service that the consumer should be receiving in the confirmation wizard. It reflects what is in the consumer plan.
- Subservice – This is the same as the service. It is a breakdown of the service into subcategories. It also comes from the planned services of the consumer.
- Planned (Services) – This is the number of services that the consumer's service plan indicates that they should receive. This does not change. It will always show you the planned amount regardless of changes to the actual delivered units or any updates in the wizard session.
- Session – This is the total number of units to be delivered in this confirmation session. Upon opening of the confirmation set it will be the same as the planned units and will change only when individual days are changed in the confirmation session.
- Unit Price - The unit price field is updatable. This allows for units costs to be changed according to the rules in the system. A unit cannot cost more than it is ordered for.
- Data Entry / Confirmation Days – This is the area where the actual deliveries take place. The items that show up here are either the planned or previously delivered units.
    - The light blue fonts represent planned service that will be created as deliveries unless changed. These are the planned units. If the user 0's out this entry, it will remove the unit from the delivery for the consumer.
    - Those units that will not be updated will show in grey font in the wizard. These are units that have already been delivered to the consumer. If the user 0's out this entry, it will remove the unit from the delivery for the consumer.
    - Users may also change the units to reflect any changes to what should have been delivered. This allows for updating the record using a future confirmation set.
    - The days without numbers pre-filled represent days where services have not been planned.
        - You may change a service date by removing the unit from the planned date and typing it into a non-planned date. See the example below with consumer 1 on the route.

Re- Using the Confirmation Session - When using the confirmation wizard to generate deliveries where they have moved delivery days from 1 day to another, and then reopen the delivery confirmation wizard again for the same time period, there is no clear logic for the system to know that any planned days that are undelivered, were in fact moved to some other day. This is why there are new units showing up in bold blue during the second review and if they click Save, they will indeed generate new deliveries for those

days. The wizard isn't really designed for data 'review' only for batch processing.
Suggest to run a service delivery report to see what units have been delivered.

I	Seq	Client ID	Name	Service	Subservice	Pla...	Session	Unit Price	Thu 1	Fri 2	Sat 3
▤	1	1300019...	Guest130...	HDM Meal ...	Puree LWHT	6.00	6.00	$6.00	2.00	0.00	
▤	2	1300009...	Guest130...	HDM Meal ...	Regular 1 L...	0.00	0.00	$5.50			
▤	3	1300026...	Guest130...	HDM Meal ...	Regular HCR	3.00	3.00	$6.00		1.00	
▤	4	1300034...	Guest130...	HDM Meal ...	Regular HCR	3.00	3.00	$6.00		1.00	
▤	5	1300053...	Guest130...	HDM Meal ...	Regular HCK	6.00	6.00	$7.00	1.00	1.00	
▤	6	1300049...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	7	1300019...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	8	1300026...	Guest130...	HDM Meal ...	Regular HCR	3.00	3.00	$6.00	1.00		
▤	9	1300027...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	10	1300003...	Guest130...	HDM Meal ...	Regular HCK	3.00	3.00	$7.00	1.00		
▤	11	1300040...	Guest130...	HDM Meal ...	Regular 1 L...	6.00	6.00	$5.50	1.00	1.00	
▤	12	1300019...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	13	1300055...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	14	1300047...	Guest130...	HDM Meal ...	Modified L...	6.00	6.00	$5.50	1.00	1.00	
▤	15	1300003...	Guest130...	HDM Meal ...	Regular HCR	4.00	4.00	$6.00	1.00	1.00	
🚫	16	1300024...	Guest130...	HDM Meal ...	Cardiac LW...	0.00	0.00	$6.00	S	S	S
▤	17	1300052...	Guest130...	HDM Meal ...	Modified HCR	6.00	6.00	$6.00	1.00	1.00	
▤	18	1300041...	Guest130...	HDM Meal ...	Regular HC...	2.00	2.00	$6.00			
▤	18	1300041...	Guest130...	HDM Meal ...	Regular HCR	6.00	6.00	$6.00	1.00	1.00	
▤	19	1300044...	Guest130...	HDM Meal ...	Regular HCK	6.00	6.00	$7.00	1.00	1.00	
	20	1300007...	Guest130...	HDM Meal ...	Regular 1 L...	6.00	6.00	$5.50	1.00	1.00	

Type ahead ability works on both client id and name and service allowing for a consumer to be found quickly and easily in the confirmation set. Simply click on a name in the name column and start typing in the last name of the consumer. It will highlight as you go finding the desired consumer.

Confirming Service Delivery Units - When the units are properly updated in the data entry screen you will choose to save the deliveries to the database. A confirmation message will come up and clicking yes to this allows the processing of those records to begin.
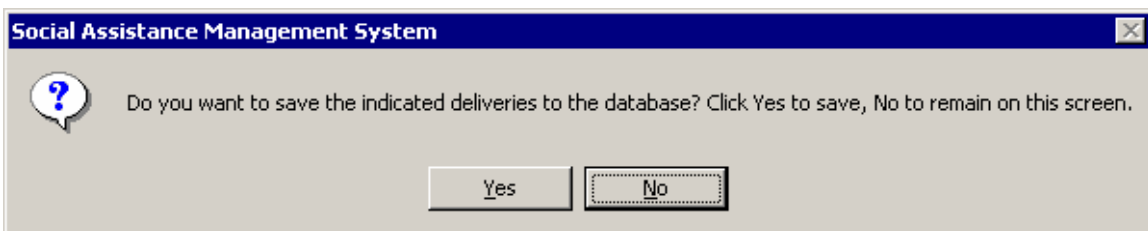
Confirmation Delivery Report - A report is generated based on the units saved. You can see and example of the report here which shows the units that were delivered as well as the failed entries along with the reason for the failure to record the delivery in the system.
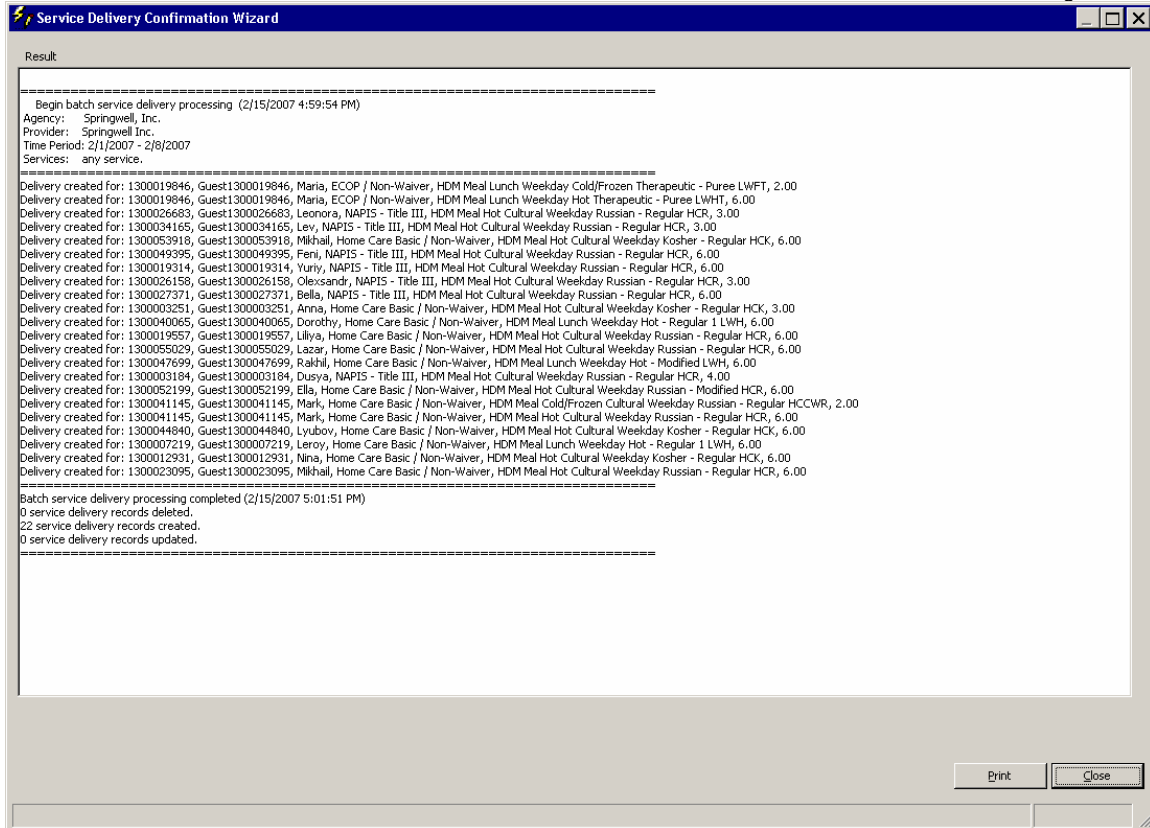
As this report prepares, service deliveries are being created and updated in the system. You should note that updating an existing record does not take as long as the creation of a new record. That means that each session after the first in the month should not take as long because new records are not being created. Existing records are being updated.

Failed Entries – These represent areas where the proposed delivery breaks a rule. It could exceed the maximum number of units allowed for the consumer as dictated by the service order. The example above is that the consumer does not have a service order. This is required for a Homemaker service.

This is a printable report as the Print button will activate when the wizard completes. The report will show the total number of records deleted, created and updated upon the indicated completion. The example below shows only added services as there were no deletions or updates to existing records.

Completion of the Confirmation - The units are now entered as deliveries.

- # Service Delivery Records Deleted – This report shows the services that were removed from the system if any.
- # Service Delivery Records Created – This shows the number of new records that were created in the confirmation session.
- # of Service Delivery Records Updated - The service delivery records are created where indicated, and if one already exists they are updated. This is true for a scenario where the consumer would already have a delivery in that month. The wizard will update the existing record, instead of creating a new one. It just updates the specific days of service for that month. A check in the consumer record confirms this.

Note: One thing to note is SAMS disconnected architecture, which means that 2 people should not be working in the same service period for the same service provider/service at a time. In doing so, they would get errors such as service already exists when saving.

II. Social Security interacts with the Consumer ID

The Social Security number in SAMS traditionally has had implications on the Consumer ID. Traditionally the software application uses two key data elements to create a consumer ID: the Social Security Number and the Date of Birth of the individual. There is a system configuration setting that no longer ties these two data elements to the creation of the consumer ID within the SIMS system. This would ensure that the consumer ID would never change for a consumer
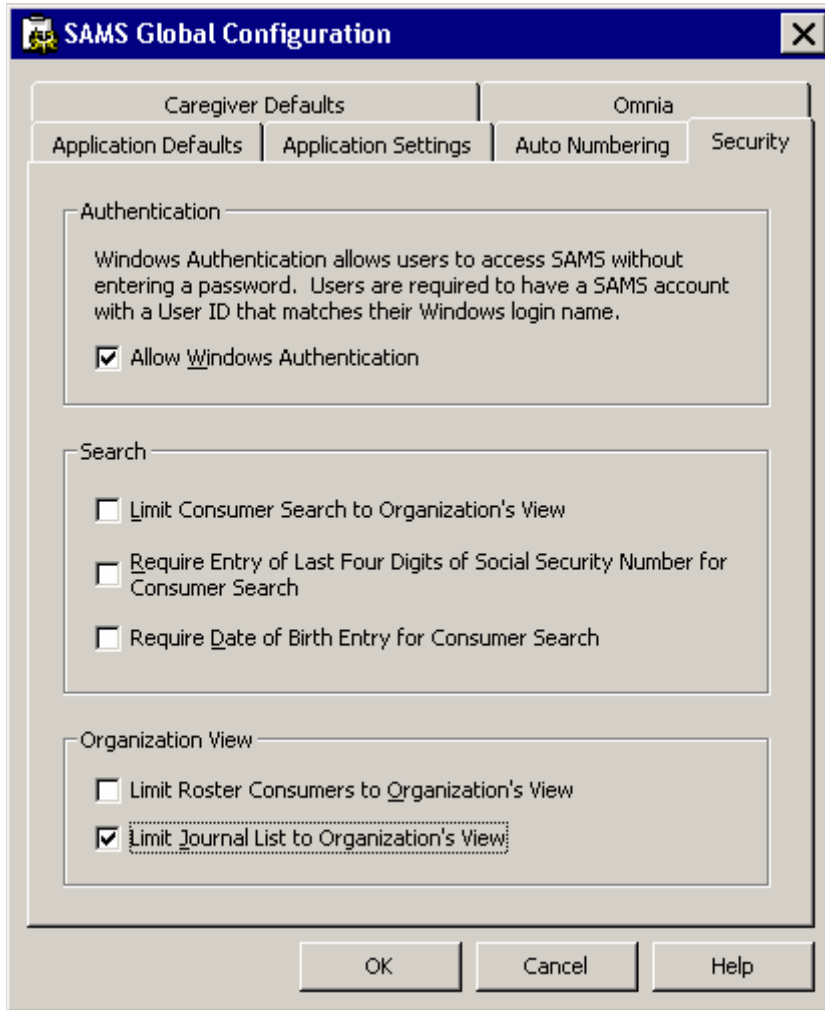
regardless of the presence of this data. The Client ID will become a permanent, randomly generated number.

- o There is no action required by the End User. The setting below will be set to the option 'Randomly – generated ID'. This ensures that the consumer ID will never change. This will remove the impacts to business processes that rely on use of Client ID's for service orders and communication with vendor.

- o When users now enter a new consumer into a SIMS database they will now have a permanent and randomly generated Consumer ID.
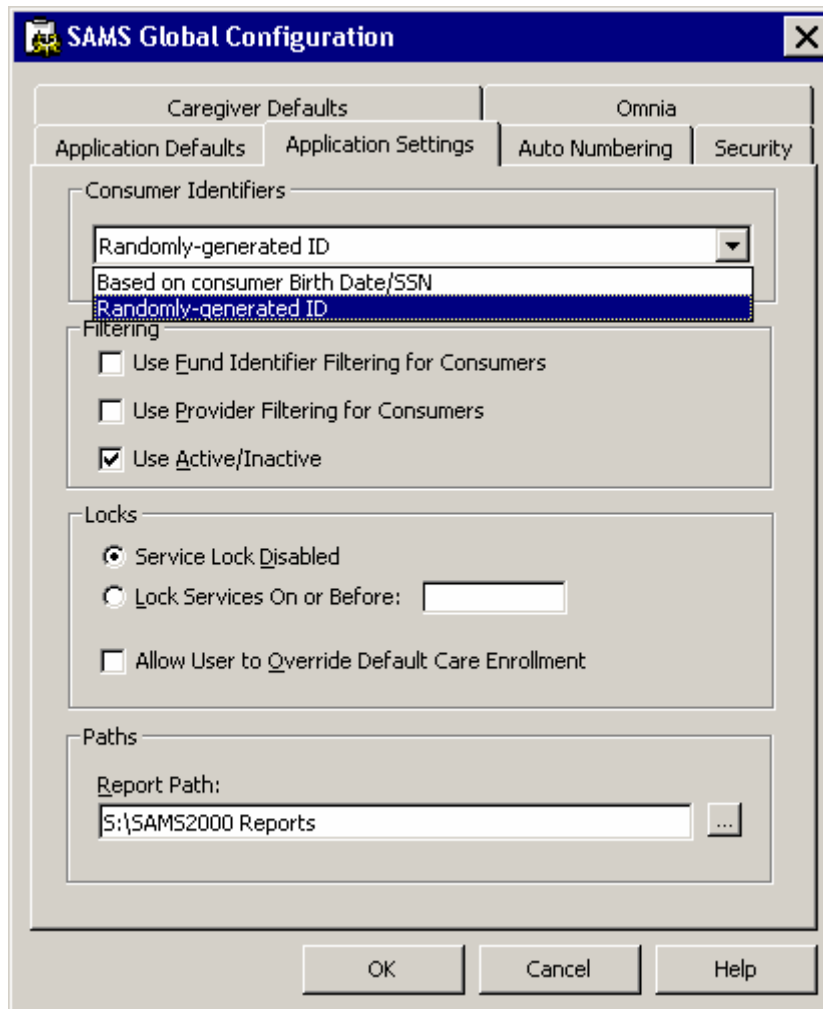
III. Journal Security
The requirement to have journal entries visible only to users from the organization to which the journal entry owner belongs is being implemented in SAMS 1.8. This requires no action from the users, but they should be aware that a global setting will be put in place that will restrict the visability of Journal entries outside of their organization. This is a system wide preference to restrict the viewing of journal entries to only users within the same organization.

SAMS Global Configuration ✕

Caregiver Defaults		Omnia	
Application Defaults	Application Settings	Auto Numbering	Security

Authentication

Windows Authentication allows users to access SAMS without entering a password. Users are required to have a SAMS account with a User ID that matches their Windows login name.

☑ Allow Windows Authentication

Search

☐ Limit Consumer Search to Organization's View

☐ Require Entry of Last Four Digits of Social Security Number for Consumer Search

☐ Require Date of Birth Entry for Consumer Search

Organization View

☐ Limit Roster Consumers to Organization's View

☑ Limit Journal List to Organization's View

[OK] [Cancel] [Help]

When the option under Organization view – 'Limit Journal List to Organization's View' is set. The Journal security is put into place. Now users can create journals and users from other agencies, even if they are sharing the consumer cannot view the journals of another agency. Again, this would only allow users to see journal entries 'created' by someone associated with their Agency effectively silo-ing the journal data by the agency.

IV, Consumer List Paging

As a performance improvement measure the consumer list is now viewable only in a paged view. This change was also implemented to prevent an 'Out of Memory' error seen often by users of larger databases, This could not have been corrected any other way and adheres to software best practices. This means that at most up to 10,000 consumers can be seen on any single page. Users can set this setting under the tools options preferences menu inside of SAMS to a value between 500 and 10,000 with the default upon install being 5,000.
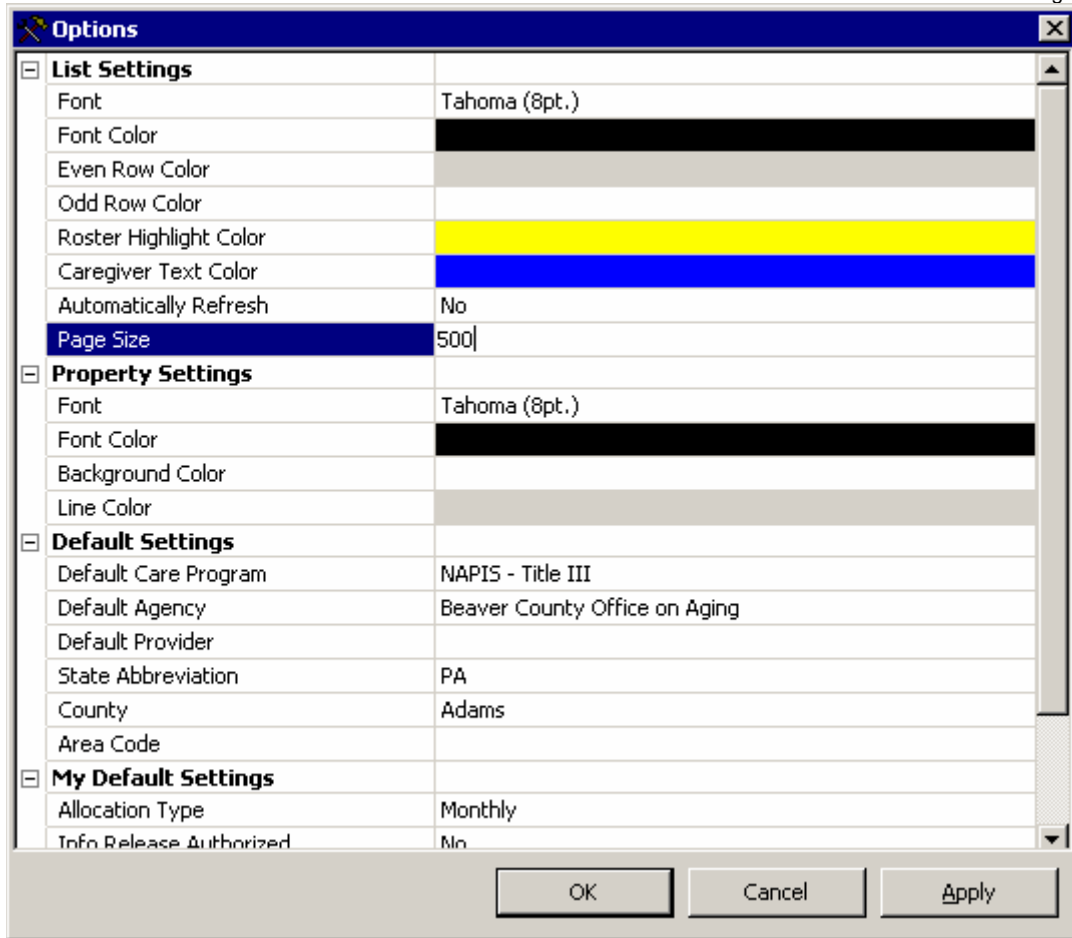
In previous versions of SAMS, when opening the Consumer List in large databases SAMS was hitting limitations with the Microsoft Operating system. It was upon Microsoft's recommendation, that we adopt a style already in use in hundreds of applications, which is to limit the amount of data on any single view.

This does limit the use of both the type-ahead and Find options on the consumer list, since the user must be on the correct page to find the consumer they wish to work with. However there are some features found within SAMS that should prove to be beneficial in these scenarios.

Recommended usage changes:

Keep a filtered list: Filtering the consumers with specified criteria that you set will reduce the number of consumers overall and fit them to one page. This may be by selecting an enrollment in a specific program, a relationship with a specific consumer provider, or county of residence. These filters, as always, can be selected by using the "Filter" button found on the Consumer List.

Use the last name filter option to quickly find a consumer: On the main screen, there is an option to pull up consumers with a last name between certain letters. In addition, users can type the first couple of letters of the person **they would like to find and** click *Apply*. When a user does this, the consumer list will be limited to just those people that have the last name that you entered.

For instance, you will see in the screenshot below that the user wanted to quickly look for their

consumer "Abernathy" so they simply typed in 'aber' in the Last Name field, and it showed only consumers with the last name of 'aber' in their list.

Use the Search Window: This can be accessed by the short cut CTL-E, select the client you want and click OK to open that client:

Switch to the correct page: Before attempting to select a client who isn't on your current page, drop down the page listing to select the range that is specific to the client you are looking to open.

Aaron, Abby - Hinton, Norene	▼

**Removal of Default Provider and Default Agency**

In addition to the paged consumer view, the current columns list was modified to remove the indication of default provider and default agency. This change resulted in a *300%* speed improvement for loading the consumer list, in databases with 20,000 clients or more.

In addition, this change was necessary to implement a new security feature that allows SAMS administrators to restrict users from seeing consumer provider relationships by organization. If Synergy had not removed the provider column, then the processing involved for this new security would have resulted in a decrease in performance.

Recommended usage changes:

Utilization of Filters: Users can still filter the consumer list to specific default providers, and default agencies to see the group of consumers associated with that user.

Utilization of the Contacts Screen: A new feature was added that allows the user to see at a glance, not only which default provider the consumer is serviced by but also other providers associated with the consumer and their business contact numbers.
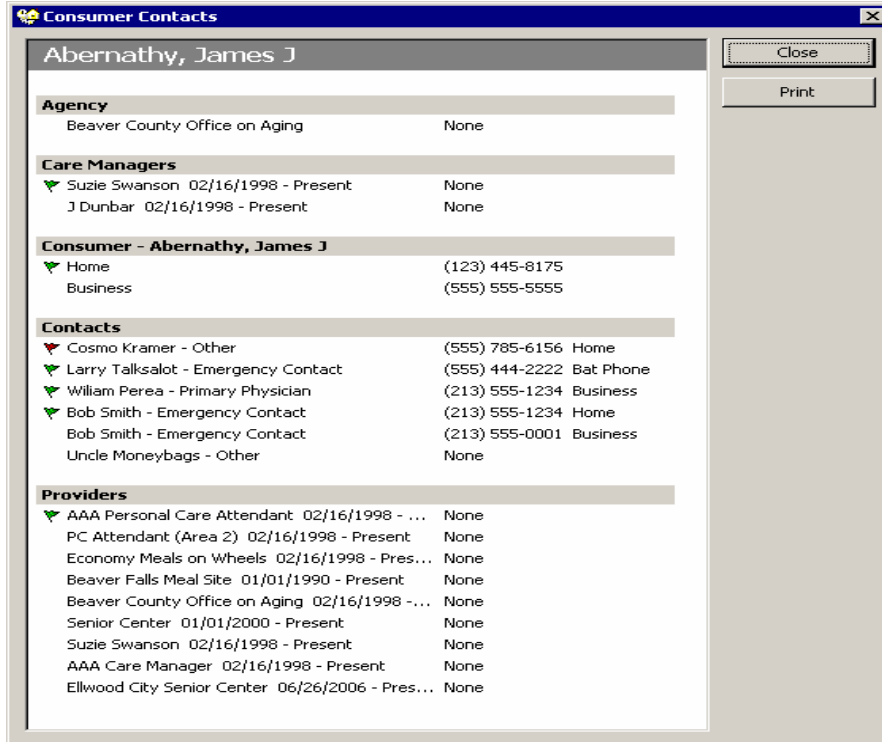
This screen can be accessed, by consumer from the main list via the Contacts Tool Button.

Utilization of the Reports: To see at a glance all the consumers associated to a specific default provider, use reporting tools rather than the consumer list.