SIMS

Overview

Activities & Referrals is new functionality that replaces Action Items in a new version of SAMS, released February 2008 (SAMS 1.9.3).   Actions remain intact in the system today. The action is the specific item that is taking place within Activities/Referrals.

Activities & Referrals are a more robust version of Action Items. The list of actions used in SAMS previously is intact in the system today. Most importantly, Actions can now be assigned directly to a specific Agency, Provider, or Case Manager.

An Activities & Referrals button, which opens the Activities & Referrals listing screen, has replaced Action Items on the SAMS toolbar. The Activities & Referrals screen provides users a consolidated listing of all the activities and referrals associated with their agency. Users will be able to manage all aspects of Activities & Referrals including: creating, editing, viewing, filtering and closing them from this screen. Users will also be able to sort and filter only the Activities & Referrals they want to view.

This new Activities & Referrals screen reduces the need to run Action reports, although reporting will still be available, and often preferable.

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Revision History

Date	Version	Description	Author
January 23, 2008	1.0	Draft for release to SIMS Community	Brendan Carroll

Getting Ready to Transition from Actions to Activities/Referrals

All Action Items currently in SAMS version 1.8.5 will go through a data conversion process to transform them to Activities/Referrals for SAMS 1.9.3. This will take place during system downtime over the weekend, and will be available to users the morning of Tuesday February 19, 2008.

During this update the Actions previously entered by users from your organization will be converted to Activities/Referrals that are associated to your organization, based on the user who created the Action. We recommend that agencies run Action Reports during the afternoon of Friday, February 15th to record work-in-progress.

1. **Review** all agency processes that use Actions and Action Reports.
2. **Report Settings**: For all Action Reports in current use, record report settings before the upgrade as a safeguard.
3. **Backups of Actions in Progress**: on the afternoon of Friday February 15, run Action Reports on Actions that are not complete (for example, Action Status is not started, in progress, etc.). Save these reports as MS Word files (or other desired format); so that your staff can compare these reports to Activities/Referrals reports your staff will run after the new functionality is released. Make sure to indicate "Print Parameters selected" so that you can easily reproduce the report settings.
4. **Webinars / Training**: Agency SIMS trainers and key staff currently using Actions should plan to attend one of the training webinars. These are train-the-trainer sessions targeted to your agency's SIMS Subject Matter Experts (SMEs).

New Features & Functionality

A new button has been added to the toolbar in SAMS, called **Activities & Referrals**.

This button opens up the Activities & Referrals listing screen, which will show you all the Activities & Referrals that belong or have been assigned to your Agency. All aspects of Activities & Referrals can be managed from this screen.

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Activities & Referrals: New Screen
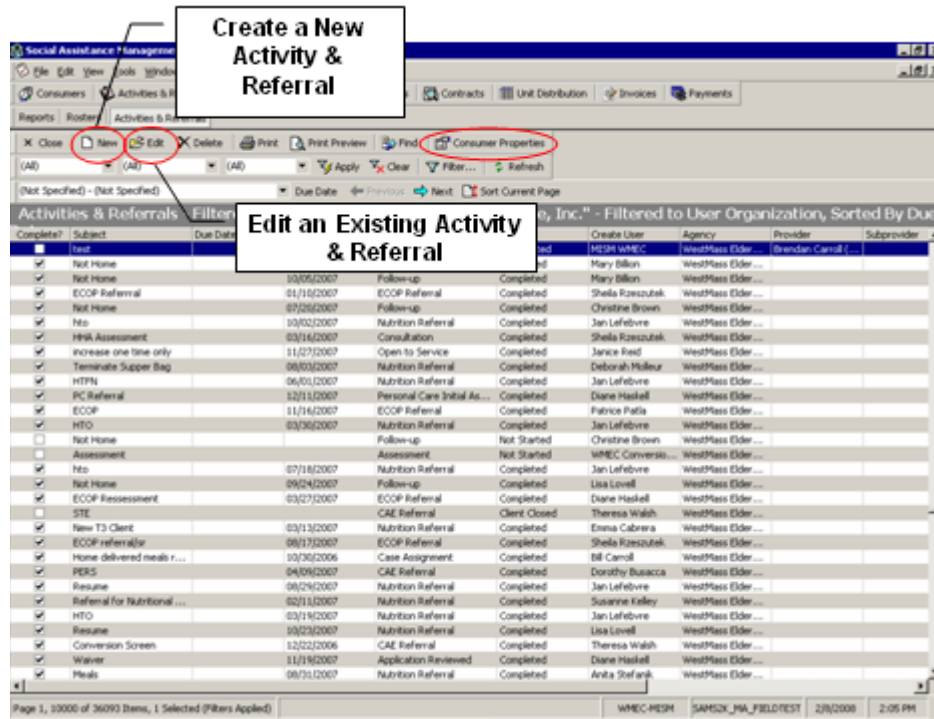
Users can filter or sort the list to see only the Activities & Referrals that they would like to see by using quick filters.
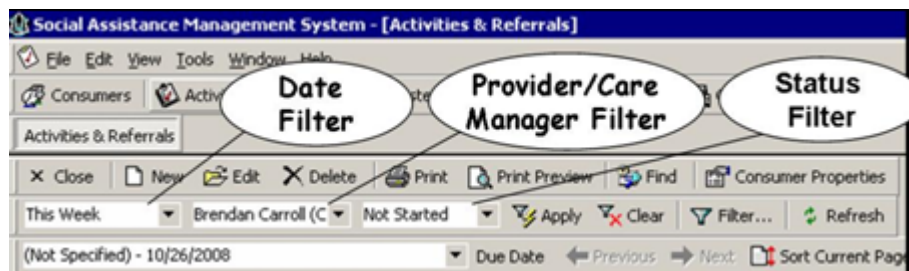
Users can also filter their Activities & Referral lists by more criteria by using the *Filter* button.

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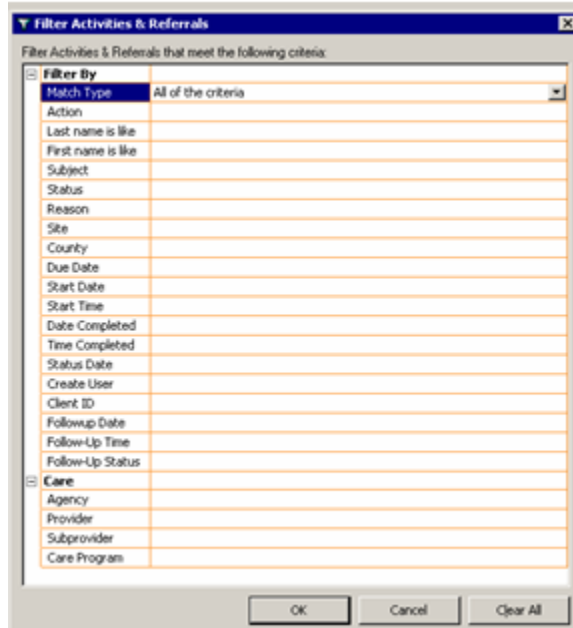
Activities & Referrals: Consumer View

The Actions button in the Consumer Record has been replaced by the Activities & Referrals button.
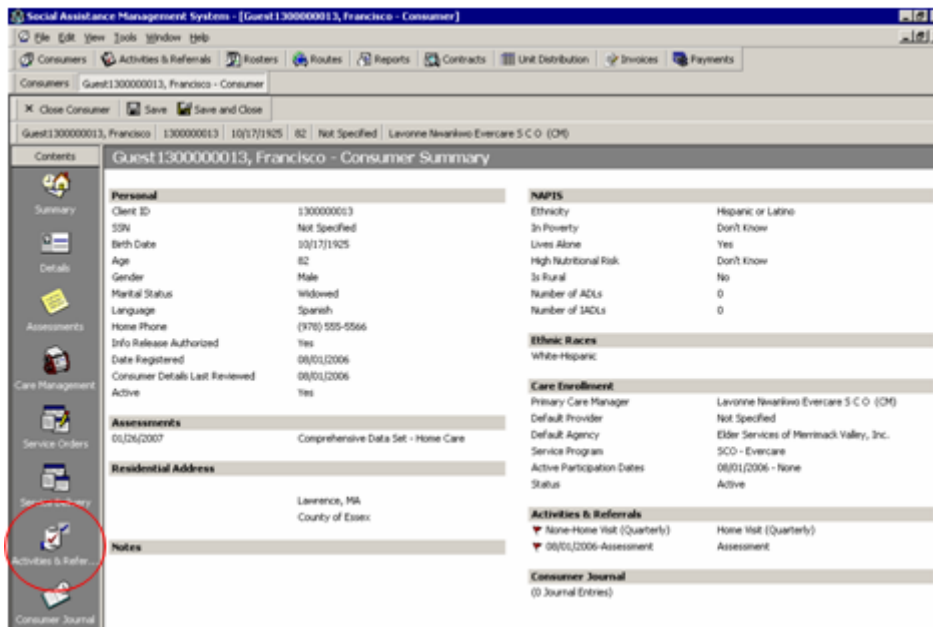
When creating a new Activities & Referrals, you will notice that the screen is more comprehensive. The additional fields give users the ability to assign tasks to agencies, providers and case managers.

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Social Assistance Management System - [Untitled - Activity/Referral]

File   Edit   View   Tools   Window   Help

Consumers   Activities & Referrals   Rosters   Routes   Reports   Contracts   Unit Distribution   Invoices   Payments

Activities & Referrals   Untitled - Activity/Referral

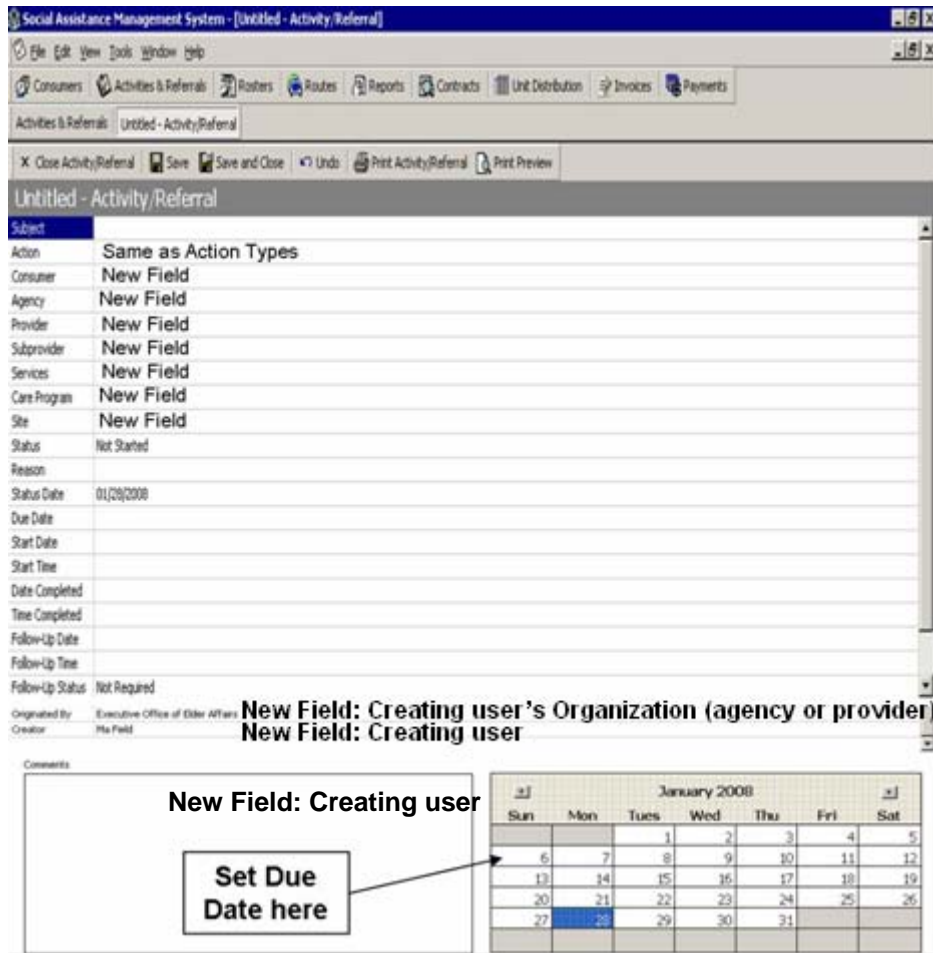X Close Activity/Referral   Save   Save and Close   Undo   Print Activity/Referral   Print Preview

Untitled - Activity/Referral

Subject	
Action	Same as Action Types
Consumer	New Field
Agency	New Field
Provider	New Field
Subprovider	New Field
Services	New Field
Care Program	New Field
Site	New Field
Status	Not Started
Reason	
Status Date	01/28/2008
Due Date	
Start Date	
Start Time	
Date Completed	
Time Completed	
Follow-Up Date	
Follow-Up Time	
Follow-Up Status	Not Required
Originated By	Executive Office of Elder Affairs **New Field: Creating user's Organization (agency or provider)**
Creator	Ma Field **New Field: Creating user**

Comments

New Field: Creating user

Set Due Date here

January 2008

Sun	Mon	Tues	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		

Scenario 1: Create Activity & Referral and Assign to User at Your Agency

Scenario: Intake worker receives a call from a consumer and needs to assign a Home Care Referral to the Assigning Supervisor.

#	Step	Notes
1	In the consumer's record, click on **Activities & Referrals** button in the navigation pane.	**Activities & Referrals** can also be created from the Activities & Referrals screen. You will simply add the consumer through a search dialog in the Activity / Referral record.
2	Click **Add Activity/Referral** on the toolbar.	
3	Enter an appropriate subject, typing in the free-text field.	
4	Select Action type = **Home Care Referral.**	

#	Step	Notes
5	Select Agency = <Your Agency>.	Activity Agency is a required field.
6	Select Provider = <Agency> Assigning Supervisor.	Note: Case Managers are considered providers in SAMS. You can assign an Activity to any of your agency's Care Managers, by name.
7	The Status defaults to **Not Started**, so change if necessary.	
8	Enter in a Due Date or double click on the appropriate date in the calendar at the bottom of the screen.	
9	Click **Apply & Close.**	
10	**Save** the consumer record.	To view the Activity & Referral assigned please see: ***Viewing the Activities & Referrals Assigned to your Department.***

Scenario 2: Create Activity & Referral – Reminder for Future Task

Scenario: Case Manager wants to setup a reminder for when a consumer is up for annual re-determination.

#	Step	Notes
1	In the consumer's record, click on **Activities & Referrals** button in the navigation pane.	**Activities & Referrals** can also be created from the Activities & Referrals screen.
2	Click **Add Activity/Referral** on the toolbar.	
3	Enter an appropriate subject, typing in the free-text field.	
4	Select Action type = **Annual Re-determination.**	
5	Select Agency = <Your Agency>.	This is a required field.
5	Select Provider = Select Your Name.	Note: Case Managers are considered providers in SAMS.
6	The Status defaults to **Not Started**, so change if necessary.	
7	Enter in Consumer re-determination date in the Due Date field or double click on the appropriate date in the calendar at the bottom of the screen.	
8	Click **Apply & Close.**	

#	Step	Notes
9	**Save** the consumer record.	To view what the Activity & Referral assigned please see: ***Viewing Activity & Referral for Tasks due Next Week.***

Scenario 3: Create Activity & Referral – For another Agency

Scenario: Agency AAA needs to present a consumer to Coastline Elderly Services for a GAFC Initial Assessment.

This particular process for GAFC is described in more detail in an updated Job Aid entitled *Job Aid (revised) - Coastline G-AFC Processing within SIMS.* The document will be distributed to the SIMS user community in the week of February 11, 2008.

#	Step	Notes
1	In the consumer's record, click on **Activities & Referrals** button in the navigation pane.	**Activities & Referrals** can also be created from the Activities & Referrals screen.
2	Click **Add Activity/Referral** on the toolbar.	
3	Enter an appropriate subject, typing in the free-text field.	
4	Select Action type = **GAFC Initial Assessment.**	
5	Select Activity **Agency** = Agency AAA	Activities & Referrals **Agency** should always be the Agency that is assigning the task.
5	Select Activity **Provider** = Coastline Elderly Services	Activity & Referral **Provider** should always be the Agency to which the task is assigned. This element must be correct; otherwise the assigned-to Agency will not see the Activity.
6	**Status** = today's date.	
7	In **Comments** field, indicate name of submitting ASAP and contact person with phone number.	
8	Click **Apply & Close.**	
9	**Save** the consumer record.	To view what the Activity & Referral assigned to your agency please see: ***Viewing Activities & Referrals***

#	Step	Notes
		Assigned to Your Agency from another Organization.

Activities & Referrals Reporting

To access the Consumer Activity/Referral report:

Click on **Reports**.
Click on **Activities & Referrals** in left-hand contents pane.
Double click on **Consumer Activities/Referrals Report**.

In the Consumer Activities / Referrals report, users can report on a majority of the fields contained in the Activity & Referrals by selecting filters under the Activity/Referral section of the report.


Filtering Your Activities & Referral List Screen

1. Click **Activities & Referrals** on the toolbar.
2. Click **Filter** on the toolbar.
3. In the *Filter* screen, select the *Match Type* under the *Filter By* heading. Select **All of the criteria**, **At least one of the criteria**, or **None of the criteria**.
4. Enter information in the appropriate fields.
5. Click **OK**.
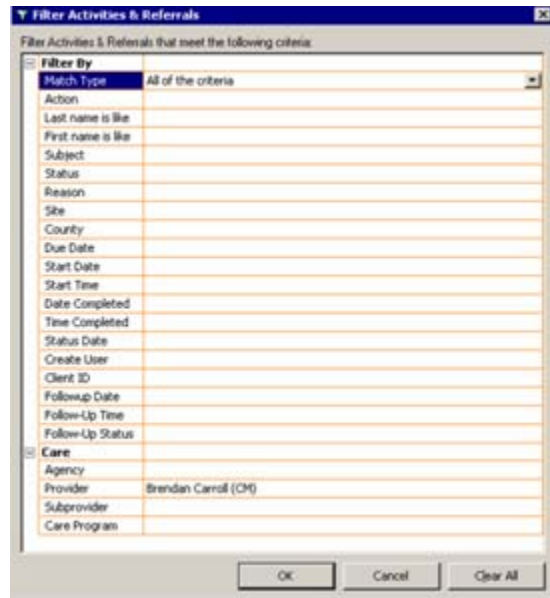
6. SAMS re-displays the Activities & Referral list with only the records meeting your specifications. The title of the list shows the number of filter criteria or the criteria itself if you only entered one filter.
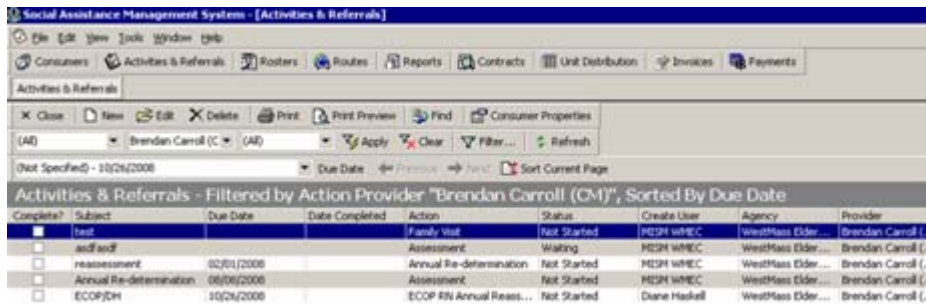
7. Use the **Clear All** button to clear all filters.

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Viewing the Activities & Referrals Assigned to your Department.

Sample Report Definition:

This report definition will return all Home Care Referrals with the status of Not Started that are assigned to SPR Assigning Supervisor.

Report:	
Choose Columns for Client:	(All)
Choose Columns for Group:	(All)
Print Parameters:	Selected Only
Group By:	No Grouping
Group per Page:	No
Sort By:	Client ID
Print Action Details:	Yes
Print Consumer Details:	Yes
Print Action Comments:	Yes
Include Consumer Groups:	Yes
Activities/Referral	
Activities/Referral:	Home Care Referral
Status:	Not Started
Agency:	Springwell, Inc.
Provider:	SPR Assigning Supervisor (CM)

Note: If you are a case manager and want to see all the actions that have been assigned to you, then you will want to select your name in the Provider field in the Activity/Referral section of the report. **Do not** select your name under the Case Managers section because this will display all the Activities & Referrals of all clients that you are assigned to.

Sample Filtering Parameters:

This filtering criterion will narrow down the Activities & Referrals list screen to show all Home Care Referrals with the status of Not Started that are assigned to SPR Assigning Supervisor.

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Viewing Activity & Referral for Tasks due Next Week
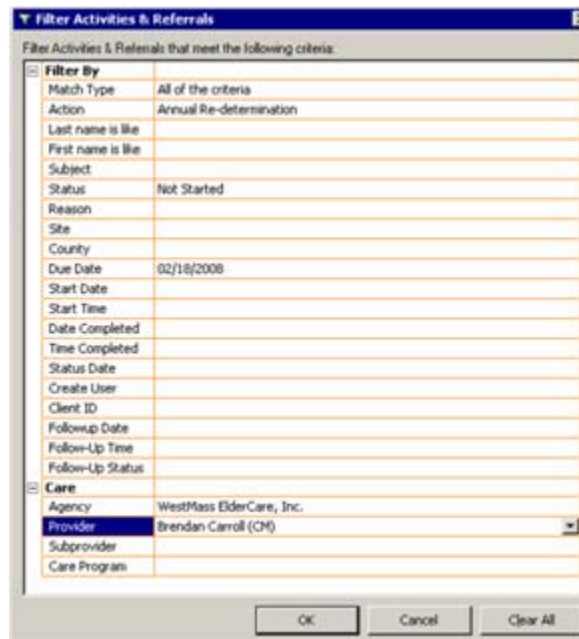
Sample Report Definition:

This report definition will return all Annual Re-determinations with the status of Not Started that are assigned to Brendan Carroll (CM) with a Due Dates between February 18th and 22nd.

Report:	
Choose Columns for Client:	(All)
Choose Columns for Group:	(All)
Print Parameters:	Selected Only
Group By:	No Grouping
Group per Page:	No
Sort By:	Client ID
Print Action Details:	Yes
Print Consumer Details:	Yes
Print Action Comments:	Yes
Include Consumer Groups:	Yes
Activities/Referral	
Activities/Referral:	Annual Re-determination
Status:	Not Started
Due Date (on or after):	2/18/2008
Due Date (on or before):	2/22/2008
Agency:	WestMass ElderCare, Inc.
Provider:	Brendan Carroll (CM)

Sample Filtering Parameters (Activities & Referrals Screen):

This filtering criterion will return all Annual Re-determinations with the status of Not Started that are assigned to Brendan Carroll (CM) with a Due Date of February 18th.

Note: Users can only filter on one parameter in each field, so in this example they can only filter on a specific due date, not a date range.

Filter Activities & Referrals

Filter Activities & Referrals that meet the following criteria:

Filter By	
Match Type	All of the criteria
Action	Annual Re-determination
Last name is like	
First name is like	
Subject	
Status	Not Started
Reason	
Site	
County	
Due Date	02/18/2008
Start Date	
Start Time	
Date Completed	
Time Completed	
Status Date	
Create User	
Client ID	
Followup Date	
Follow-Up Time	
Follow-Up Status	
Care	
Agency	WestMass ElderCare, Inc.
Provider	Brendan Carroll (CM)
Subprovider	
Care Program	

OK   Cancel   Clear All

Viewing Activities & Referrals Assigned to Your Agency from another Organization

Sample Report Definition:

This report definition will return all GAFC Initial Assessment referrals with the status of Not Started that have a Status Date of February 18th that are assigned to Coastline Elderly Services.

```
Report:
    Choose Columns for Client:      (All)
    Choose Columns for Group:       (All)
    Print Parameters:               Selected Only
    Group By:                       No Grouping
    Group per Page:                 No
    Sort By:                        Client ID
    Print Action Details:           Yes
    Print Consumer Details:         Yes
    Print Action Comments:          Yes
    Include Consumer Groups:        Yes
Activities/Referral
    Activities/Referral:            GAFC Initial Assessment
    Status:                         Not Started
    Status Date (on or after):      2/18/2008

    Provider:                       Coastline Elderly Services, Inc.
```

Sample Filtering Parameters (Activities & Referrals Screen):

This filtering criterion will return all GAFC Initial Assessment referrals with the status of Not Started that have a Status Date of February 18th that are assigned to Coastline Elderly Services.