

Basic Training for New SAMS Users

Nursing Home Transition

AGING NETWORK

MODULE 2

COLUMN FORMATING

Slides 2 through 14

SEARCH

Slides 15 through 25

FIND

Slides 26 through 33

Basic Training for New SAMS Users

Nursing Home Transition

AGING NETWORK

MODULE 2

COLUMN FORMATING

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Ur

Consumers

Close Consumers Register New Open Delete Properties Care Enrollments

Consumers (All) (All) Apply Clear Filter Find

Tim Tyler - (Not Specified) Primary Care Manager Previous Next

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

1. **Note:** Columns are sorted by clicking on the column heading. In this screenshot, the column headings are **Name, Primary Care Manager, Active** and **Address**. In this example, the Primary Care Manager was sorted in descending order by clicking on the column heading twice. The first click sorts the data in ascending order and the second click will sort it in descending order.

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>114 Helpe Lane</i>
Ehrhart, Dana	Feathers	<input checked="" type="checkbox"/>	12 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	...
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	...
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer C
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Str

2. **Note:** Consumers and their information listed in *italics* indicate the case is inactive. **Note:** In the third column, Active is not checked.

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

3. Note: Supervisors, Care Managers and Assessors can choose which column headings will appear on their screen and in which order.

Social Assistance Management System - [Consumers]

File Edit **View** Tools Window Help

Consumer Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

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

Close Cor Consumers Reports Contracts Unit Distribution Invoices Payments

Tim Tyler - (N) Consumer Invoices Payments

Name Crazy, Im Longenecker, K Nut, Im A Cook, Mary M Getgen, Denise Marmol, Carlos Brown, Debra A Terminated WL Abc, A Waiting List No Funding, Consumer Waiting List/No Funding, Service Only Soto, Gevony Ehrhart, Dana DeSantis II, Dennis J Swan III, Joey F A, A A Weiser, Naomi Goodytwoshoes, Im A

Primary Care Manager Previous Next Sort All Pages

Apply Clear Filter Find Search Merge Refresh Print... Print Preview...

Current View

Filter... Ctrl+Y

Format Columns...

Consumers Consumer Groups Caregivers

Assessor		123 A Street
lyn Brumbaugh		31 Miller's
A Fenton	<input checked="" type="checkbox"/>	123 Happ
A Fent	<input checked="" type="checkbox"/>	443 Mem
ng Ap	<input checked="" type="checkbox"/>	1201 We
ngel	<input checked="" type="checkbox"/>	1000 We
ng Appel		12 Main Street
Cari		100 Wait
Care		Waiting For PC Lane
Britt		134 Helpe Lane
Britt	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
Brit		15 South Street
Brittany		102 Canal St
Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

4. Click VIEW

After clicking on EDIT, this window Opens

5. Click CURRENT VIEW

After clicking on CURRENT VIEW, this window Opens

6. Click FORMAT COLUMNS

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoice
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollments Assessments
 Consumers (All) (All) Apply Clear Filter Find Search Merge Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Co
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Wa
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
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DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second S

Format Columns
 Available Columns:
 SSN
 Age
 DOB
 Gender
 High Nutritional Risk?
 In Poverty?
 Address 2
 Residential ZIP Code
 Alt ID 1
 Alt ID 2
 Reason
 Veteran?
 Medicare No
 A.K.A Name
 Details Last Updated

Current Columns:
 Name
 Primary Care Manager
 Active?
 Address

Ascending Descending
 OK Cancel Reset

7. Clicking on **FORMAT COLUMNS** as demonstrated in Slide 6, opens the Format Column window

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Distribution Invoices Payments
 Consumers
 Close Consumers Register New Open Delete Properties Assessments Service History Contacts Caregivers
 Consumers (All) (All) Apply Clear Filter Search Merge Refresh Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
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Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way St
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Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

8. SCROLL up and down to view the AVAILABLE COLUMNS

Format Columns

Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Residential ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare No
- A.K.A Name
- Details Last Updated

Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

Ascending Descending
 OK Cancel Reset

1/8/2010 PA Department of Aging and Office of Long Term Living
 MODULE 2 Format - Search - Find 8

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollments Assessments Service History Contacts Caregivers
 Consumers (All) (All) Apply Clear Filter Find Search Merge Refresh Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
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Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feather	<input type="checkbox"/>	134 Helpe Lane
Ehrhart, Dana	Brittany Feather	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, De		<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey		<input checked="" type="checkbox"/>	102 Canal St
A, A A		<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi		<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoe		<input checked="" type="checkbox"/>	116 North Second Street

Format Columns

Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Residential ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare No
- A.K.A Name
- Details Last Updated

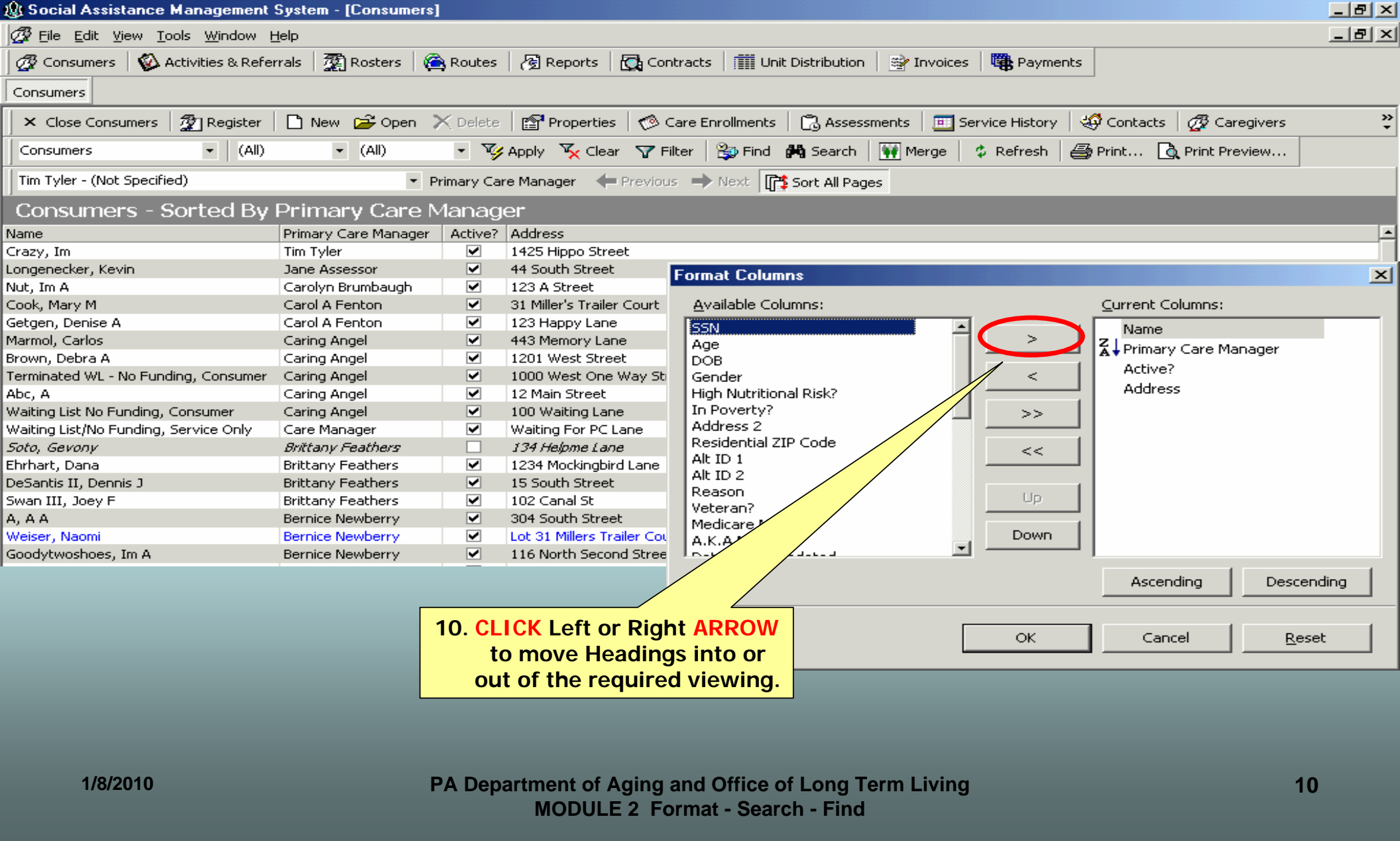
Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

Ascending Descending

OK Cancel Reset

9. HIGHLIGHT the columns you want showing on your screen when you log on



Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
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Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Helpe Lane
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DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Format Columns

Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Residential ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare
- A.K.A

Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

Ascending Descending

OK Cancel Reset

10. **CLICK** Left or Right **ARROW** to move Headings into or out of the required viewing.

File Edit View Tools Window Help
Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers
Close Consumers Register New Open Delete Properties
Contacts Caregivers

Consumers (All) (All) Apply Clear Filter
Print... Print Preview...

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
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Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
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Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

11. HIGHLIGHT the Column Heading by clicking on it

Format Columns

Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Residential ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare No
- A.K.A Name
- Details Last Updated

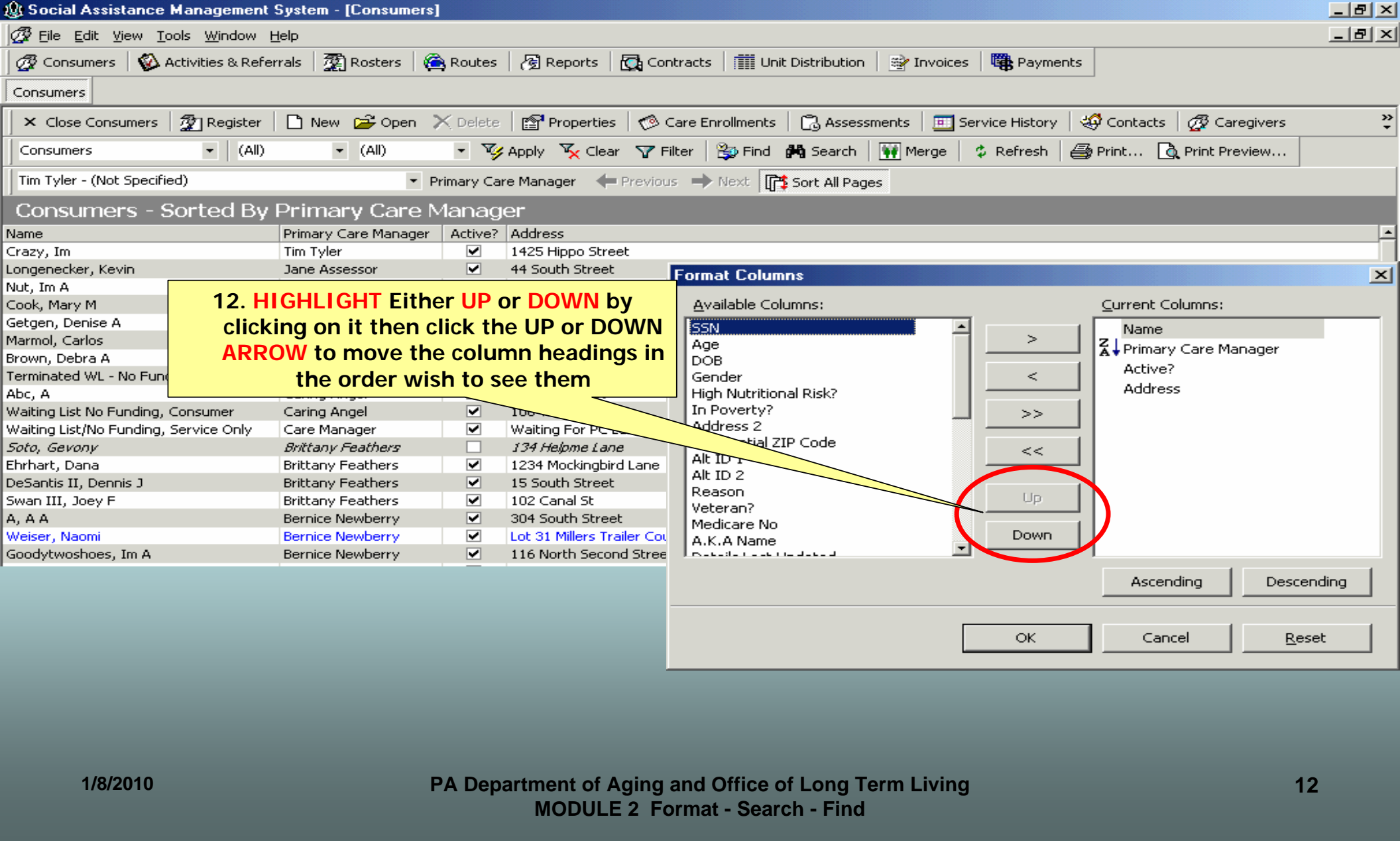
Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

> < >> << Up Down

Ascending Descending

OK Cancel Reset



Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A			
Cook, Mary M			
Getgen, Denise A			
Marmol, Carlos			
Brown, Debra A			
Terminated WL - No Fun			
Abc, A			
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Heljme Lane
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Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

12. HIGHLIGHT Either UP or DOWN by clicking on it then click the UP or DOWN ARROW to move the column headings in the order wish to see them

Format Columns

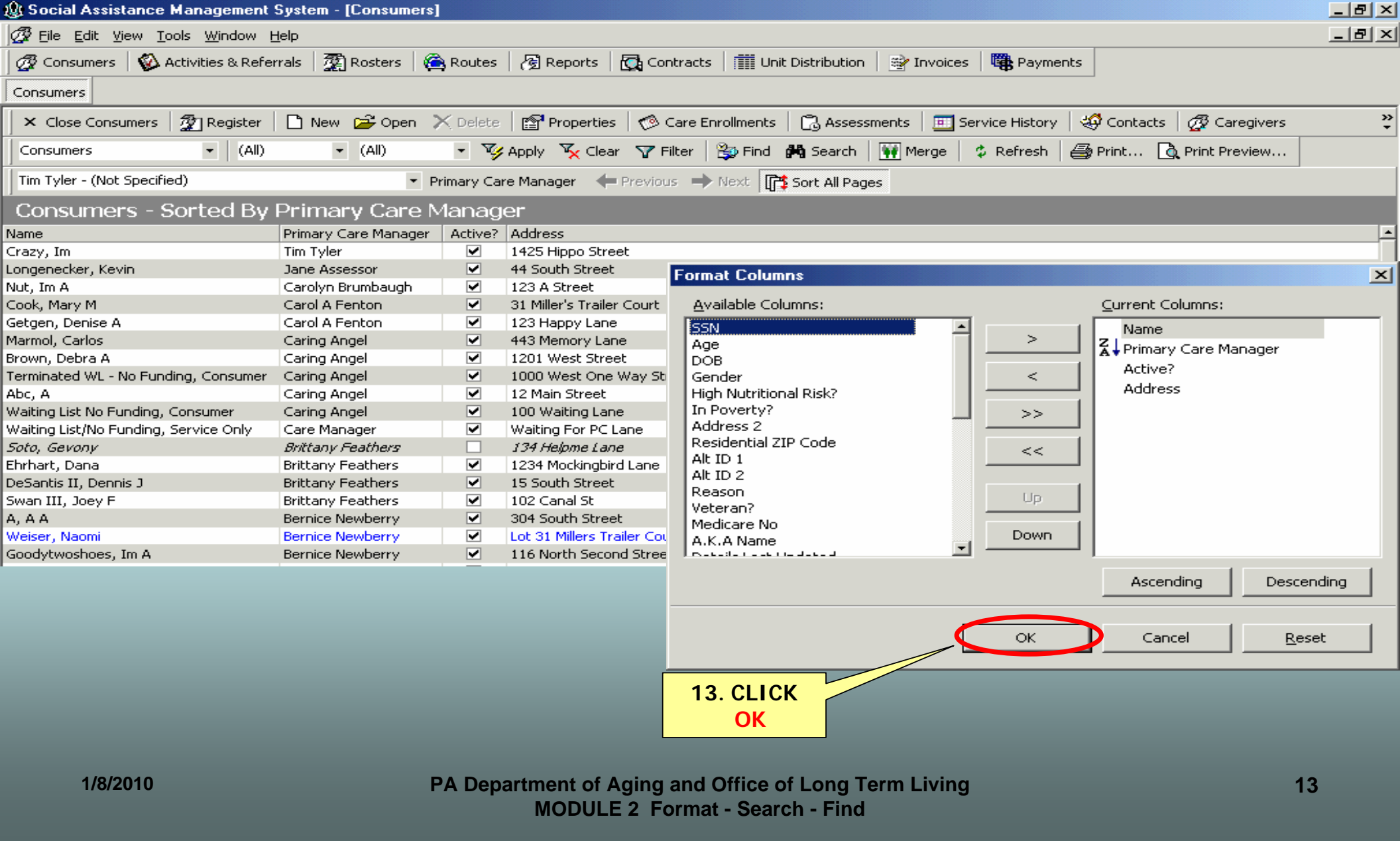
Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Special ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare No
- A.K.A Name
- Details Last Updated

Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

Buttons: > < >> << Up Down Ascending Descending OK Cancel Reset



Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
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Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Cou
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Format Columns

Available Columns:

- SSN
- Age
- DOB
- Gender
- High Nutritional Risk?
- In Poverty?
- Address 2
- Residential ZIP Code
- Alt ID 1
- Alt ID 2
- Reason
- Veteran?
- Medicare No
- A.K.A Name
- Details Last Updated

Current Columns:

- Name
- Primary Care Manager
- Active?
- Address

Ascending Descending

OK Cancel Reset

13. CLICK
OK

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Di
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollment
 Consumers (All) (All) Apply Clear Filter
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Heljme Lane
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street
Jones, Frank		<input checked="" type="checkbox"/>	
Grace, Mark		<input type="checkbox"/>	
Johnson, Reed		<input checked="" type="checkbox"/>	
White, Mildred		<input checked="" type="checkbox"/>	
Jones, John P		<input checked="" type="checkbox"/>	
Consumer, Martin		<input checked="" type="checkbox"/>	
Crawford, Loretta		<input checked="" type="checkbox"/>	
Dempster, Ryan		<input checked="" type="checkbox"/>	

14. Clicking on OK as demonstrated in Slide 13, closes the window and formats the columns in the manner chosen

Basic Training for New SAMS Users

Nursing Home Transition

AGING NETWORK

MODULE 2

SEARCH

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpme Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

1. Click **SEARCH** for searches in the **ENTIRE** database.

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollments Assessments Service History Contacts Caregivers
 Consumers (All) (All) Apply Clear Filter **Find** Search Merge Refresh Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

2. Click on **FIND** for searches in the **VIEWABLE PAGE ONLY!**

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters

Search Consumers

Consumer

Last name is like

First name is like

Date of birth is

SSN

Social Sec. Last 4 Digits

Client ID like

AKA Name is like

Alternate ID1 is like

UPTCard ID

Medicaid No. like

Medicare No. like

Area Code

Home Phone

Contact Name is like

Ethnic Race

Residential Address

Care Providers

Add New... Find Clear

Client Id	Full Name	AKA Name	DOB	SSN	Town	Home Phone

Details OK Cancel

3. Clicking on **SEARCH** as demonstrated in Slide 16 opens this window

Name	Pr
Crazy, Im	er
Longenecker, Kevin	Jane Assessor
Nut, Im A	Carolyn Brumbaugh
Cook, Mary M	Carol A Fenton
Getgen, Denise A	Carol A Fenton
Marmol, Carlos	Caring Angel
Brown, Debra A	Caring Angel
Terminated WL - No Funding, Consumer	Caring Angel
Abc, A	Caring Angel
Waiting List No Funding, Consumer	Caring Angel
Waiting List/No Funding, Service Only	Care Manager
Soto, Gevony	Brittany Feathers
Ehrhart, Dana	Brittany Feathers
DeSantis II, Dennis J	Brittany Feathers
Swan III, Joey F	Brittany Feathers
A, A A	Bernice Newberry
Weiser, Naomi	Bernice Newberry
Goodytwoshoes, Im A	Bernice Newberry

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

Close Consumers Register

Consumers (A)

Tim Tyler - (Not Specified)

Consumers - Sorted B

Name

Crazy, Im

Longenecker, Kevin

Nut, Im A

Cook, Mary M

Getgen, Denise A

Marmol, Carlos

Brown, Debra A

Terminated WL - No Funding, Consum

Abc, A

Waiting List No Funding, Consumer

Waiting List/No Funding, Service Only

Soto, Gevony

Ehrhart, Dana

DeSantis II, Dennis J

Swan III, Joey F

A, A A

Weiser, Naomi

Goodytwoshoes, Im A

Search Consumers

Consumer

Last name is like DeSantis

First name is like Dennis

Date of birth is

SSN

Social Sec. Last 4 Digits

Client ID like

AKA Name is like

Alternate ID1 is like

UPTCard ID

Medicaid No. like

Medicare No. like

Area Code

Home Phone

Contact Name is like

Ethnic Race

Residential Address

Care Providers

Add New... Find Clear

Client Id	Full Name	AKA Name	DOB	SSN	Town	Home Phone

Details OK Cancel

4. Enter some IDENTIFYING INFORMATION

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

Close Consumers Register

Consumers (A)

Tim Tyler - (Not Specified)

Consumers - Sorted B

Name

Crazy, Im

Longenecker, Kevin

Nut, Im A

Cook, Mary M

Getgen, Denise A

Marmol, Carlos

Brown, Debra A

Terminated WL - No Funding, Consum

Abc, A

Waiting List No Funding, Consumer

Waiting List/No Funding, Service Only

Soto, Gevony

Ehrhart, Dana

DeSantis II, Dennis J

Swan III, Joey F

A, A A

Weiser, Naomi

Goodytwoshoes, Im A

Print Preview...

Caregivers

Search Consumers

Consumer

Last name is like DeSantis

First name is like Dennis

Date of birth is

SSN

Social Sec. Last 4 Digits

Client ID like

AKA Name is like

Alternate ID1 is like

UPTCard ID

Medicaid No. like

Medicare No. like

Area Code

Home Phone

Contact Name is like

Ethnic Race

Residential Address

Care Providers

Add New... Find Clear

Client Id	Full Name	AKA Name	DOB	SSN	Town	Home Phone

Details OK Cancel

5. Click FIND

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

Close Consumers Register

Consumers (A)

Tim Tyler - (Not Specified)

Consumers - Sorted B

Name

Crazy, Im

Longenecker, Kevin

Nut, Im A

Cook, Mary M

Getgen, Denise A

Marmol, Carlos

Brown, Debra A

Terminated WL -

Abc, A

Waiting List No Funding, Consumer

Waiting List/No Funding, Service Only

Soto, Gevony

Ehrhart, Dana

DeSantis II, Dennis J

Swan III, Joey F

A, A A

Weiser, Naomi

Goodytwoshoes, Im A

Search Consumers

Consumer

Last name is like DeSantis

First name is like Dennis

Date of birth is

SSN

Social Sec. Last 4 Digits

Client ID like

AKA Name is like

Alternate ID1 is like

UPTCard ID

Ethnic

Resident Address

Care Provider

Add New... Find Clear

Client Id	Full Name	AKA Name	DOB	SSN	Town	Home Phone
1016225154	DeSantis II, Dennis J	D	10/16/1922	111-64-5154		(814) 555-9999
1016383323	DeSantis, Dennis J		10/16/1938	111-22-3323		(814) 772-3418

Details OK Cancel

6. Clicking on **FIND** as demonstrated in Slide 20, opens this table

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Search Consumers

Consumer
 Last name is like DeSantis
 First name is like Dennis
 Date of birth is
 SSN
 Social Sec. Last 4 Digits
 Client ID like
 AKA Name is like
 Alternate ID1 is like
 UPTCard ID
 Medicaid No. like
 Medicare No. like
 Area Code
 Home Phone
 Contact Name is like
 Ethnic Race
 Residential Address
 Care Providers

Add New... Find Clear

Client Id	Full Name	AKA Name	DOB	SSN	Town	Home Phone
1016225154	DeSantis II, Dennis J	D	10/16/1922	111-64-5154		(814) 555-9999
1016383323	DeSantis, Dennis J		10/16/1938	111-22-3323		(814) 772-3418

Details OK Cancel

Consumers - Sorted B
 Name
 Crazy, Im
 Longenecker, Kevin
 Nut, Im A
 Cook, Mary M
 Getgen, Denise A
 Marmol, Carlos
 Brown, Debra A
 Terminated WL - No Funding, Consum
 Abc, A
 Waiting List No Funding, Consumer
 Waiting List/No Funding, Service Only
 Soto, Gevony
 Ehrhart, Dana
 DeSantis II, Dennis J
 Swan III, Joey F
 A, A A
 Weiser, Naomi
 Goodytwoshoes, Im A

Print Preview...

7. Double Click on the appropriate consumer

8. Double Clicking on the **CONSUMER** as demonstrated in Slide 22, opens this window

DeSantis II, Dennis J (1016225154) H. (814) 555-9900
 Blair Senior Services, Inc. **15 South Street Apt 4 PA**
Primary Care Manager: Bernice Newberry

(Edit Notes) Notes under Other in Details

Personal		Characteristics		Insurance	
Social Sec. No.	111-64-5154	Language	English	Medicaid #	123456
Date of Birth	10/16/1922	Homebound	No	Medicaid Policy #	234567
Age	87	Frail	No	Medicare #	345678
Status: Active	Status Date: 09/01/2004	Disabled	No	Medical Assistance ID	456789
AKA Name	D	Is Abused/Neglected	No	User Fields (Add New)	
Info Release?	No	NAPIS		MFP Target Yes	(Edit)
Date Registered	05/14/2008	Ethnicity	Not Hispanic or Latino	Routes (Add New)	
Details Last Reviewed	06/20/2008	Lives Alone	Don't Know	Bellwood HDM Bellwood Van Man	(Edit)
Marital Status	Married	High Nutritional Risk	No	Current Care Recipients (Add New)	
Gender	Male	Is Rural	No		
County	Blair	Number of ADLs	6		
Municipality	Altoona city	Number of IADLs	8		
Current Contacts (Add New)		Current Providers (Add New)			
Nancy DeSantis - Emergency Contact (spouse) H (814) 123-4567 Ext.12 (Edit)		Current Caregivers (Add New)			
Armand J - Family/Relative (Son) (Edit)					
Dr. Doolittle - Primary Physician (Family Physician) B (814) 555-8458 Ext.654 (Edit)					
Angela Zimmerman - Family/Relative (Daughter) H (814) 555-1245 Ext.12 (Edit)					

Basic Training for New SAMS Users
Nursing Home Transition
AGING NETWORK
MODULE 2

FIND

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

Consumers Activities & Referrals

Unit Distribution Invoices Payments

Consumers

Close Consumers Register

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Helpe Lane
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

1. This window will indicate the consumers available in the **VIEWABLE PAGE** for the FIND feature

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollments Assessments Service History Contacts Caregivers
 Consumers (All) (All) Apply Clear Filter **Find** Search Merge Refresh Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

2. Click **FIND** for searches in the **VIEWABLE PAGE**

3. Clicking on **FIND** as demonstrated in Slide 26, opens this window

File Edit View Tools Window Help

Consumers Activities & Referrals Contracts Unit Distribution Invoices Payments

Consumers

Close Consumers Register

Tim Tyler - (Not Specified) Primary Care Manager

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
<i>Soto, Gevony</i>	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Find what: Find Next

Search in: (All) Close

Social Assistance Management System - [Consumers]
 File Edit View Tools Window Help
 Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments
 Consumers
 Close Consumers Register New Open Delete Properties Care Enrollments Assessments Service History Contacts Caregivers
 Consumers (All) (All) Apply Clear Filter Find Search Merge Refresh Print... Print Preview...
 Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages
Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Ja		
Nut, Im A	Ca		
Cook, Mary M	Ca		
Getgen, Denise A	Ca		
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Str
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Helpe Lane
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

4. Enter IDENTIFYING INFORMATION
In this example, LAST NAME

Find

Find what: DeSantis

Search in: (All)

Find Next

Close

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Helpe Lane
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Find

Find what: DeSantis

Search in: (All)

Find Next

Close

5. Click
FIND NEXT

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

Close Consumers Register New Open Delete

Consumers (All) (All)

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	4 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Carr Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	Brittany Feathers	<input type="checkbox"/>	134 Helpe Lane
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Find

Find what: DeSantis

Search in: (All)

Find Next

Close

6. Clicking on FIND NEXT as demonstrated in Slide 29, HIGHLIGHTS a potential match

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All

7. Click CLOSE

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	304 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Lot 31 Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Second Street

Find

Find what: DeSantis

Search in: (All)

Find Next

Close

Social Assistance Management System - [Consumers]

File Edit View Tools Window Help

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

Consumers

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

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

Tim Tyler - (Not Specified) Primary Care Manager Previous Next Sort All Pages

Consumers - Sorted By Primary Care Manager

Name	Primary Care Manager	Active?	Address
Crazy, Im	Tim Tyler	<input checked="" type="checkbox"/>	1425 Hippo Street
Longenecker, Kevin	Jane Assessor	<input checked="" type="checkbox"/>	44 South Street
Nut, Im A	Carolyn Brumbaugh	<input checked="" type="checkbox"/>	123 A Street
Cook, Mary M	Carol A Fenton	<input checked="" type="checkbox"/>	31 Miller's Trailer Court
Getgen, Denise A	Carol A Fenton	<input checked="" type="checkbox"/>	123 Happy Lane
Marmol, Carlos	Caring Angel	<input checked="" type="checkbox"/>	443 Memory Lane
Brown, Debra A	Caring Angel	<input checked="" type="checkbox"/>	1201 West Street
Terminated WL - No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	1000 West One Way Street
Abc, A	Caring Angel	<input checked="" type="checkbox"/>	12 Main Street
Waiting List/No Funding, Consumer	Caring Angel	<input checked="" type="checkbox"/>	100 Waiting Lane
Waiting List/No Funding, Service Only	Care Manager	<input checked="" type="checkbox"/>	Waiting For PC Lane
Soto, Gevony	<i>Brittany Feathers</i>	<input type="checkbox"/>	<i>134 Helpe Lane</i>
Ehrhart, Dana	Brittany Feathers	<input checked="" type="checkbox"/>	1234 Mockingbird Lane
DeSantis II, Dennis J	Brittany Feathers	<input checked="" type="checkbox"/>	15 South Street
Swan III, Joey F	Brittany Feathers	<input checked="" type="checkbox"/>	102 Canal St
A, A A	Bernice Newberry	<input checked="" type="checkbox"/>	204 South Street
Weiser, Naomi	Bernice Newberry	<input checked="" type="checkbox"/>	Local Millers Trailer Court
Goodytwoshoes, Im A	Bernice Newberry	<input checked="" type="checkbox"/>	116 North Street

Find

Find what: DeSantis

Search in: (All)

Find Next

Close

8. If this is the consumer you want to open, Double Click **HIGHLIGHTED AREA**



DeSantis II, Dennis J (1016225154) H. (814) 555-9900
Blair Senior Services, Inc.

15 South Street Apt 4 PA

Primary Care Manager: Bernice Newberry

(Edit Notes) Notes under Other in Details

Personal

Social Sec. No.	111-64-5154
Date of Birth	10/16/1922
Age	87
Status: Active	Status Date: 09/01/2004
AKA Name	D
Info Release?	No
Date Registered	05/14/2008
Details Last Reviewed	06/20/2008
Marital Status	Married
Gender	Male
County	Blair
Municipality	Altoona city

Current Contacts [\(Add New\)](#)

Nancy DeSantis - Emergency Contact (spouse) H (814) 123-4567 Ext.12	(Edit)
Armand J - Family/Relative (Son)	(Edit)
Dr. Doolittle - Primary Physician (Family Physician) B (814) 555-8458 Ext.654	(Edit)
Angela Zimmerman - Family/Relative (Daughter) H (814) 555-1245 Ext.12	(Edit)

Characteristics

Language	English
Homebound	No
Frail	No
Disabled	No
Is Abused/Neglected	No

NAPIS

Ethnicity	Not Hispanic or Latino
Lives Alone	Don't Know
High Nutritional Risk	No
Is Rural	No
Number of ADLs	6
Number of IADLs	8

Current Providers [\(Add New\)](#)

Current Caregivers [\(Add New\)](#)

9. Double Clicking

HIGHLIGHTED AREA

as demonstrated in Slide 32,
Opens this window

Insurance

Medicaid #	123456
Medicaid Policy #	234567
Medicare #	345678
Medical Assistance ID	456789

User Fields [\(Add New\)](#)

MFP Target Yes	(Edit)
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Routes [\(Add New\)](#)

Bellwood HDM Bellwood Van Man	(Edit)
-------------------------------	------------------------

Current Care Recipients [\(Add New\)](#)

Basic Training for New SAMS Users

MODULE 2

END of MODULE 2. You will now be able to:

- 1. FORMAT COLUMNS*** in SAMS
- 2. SEARCH*** for a consumer in SAMS
- 3. FIND*** a consumer in SAMS

Remember, practice makes perfect. Ask your supervisor for access to the SAMS_80 Database to practice what you learned in this module.