

***Basic Training for New SAMS Users***  
***Nursing Home Transition***  
***AGING NETWORK***  
***MODULE 4***

***CARE PLAN***

Contents

- Summary
- Details
- Assessments
- Care Management**
- Service Orders
- Service Delivery
- Activities & Refer...
- Consumer Journal

**NHTCase, SAMPLE (1012239090) H. (814) 452-3665 Happy Acres Nursing Facility 1212 Brown Avenue Altoona, PA 16602**  
 Blair Senior Services, Inc. Primary Care Manager: Caring Angel

(Edit Notes)

**Personal**

Social Sec. No.	123-12-9090
Date of Birth	10/12/1923
Age	86
Status: Active	Status Date: 10/31/2008
AKA Name	
Info Release?	No
Date Registered	11/05/2008
Details Last Reviewed	11/05/2008
Marital Status	
Gender	
County	
Municipality	Blair township

**Characteristics**

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

**NAPIS**

Ethnicity	Unknown
Living Alone	Don't Know
At Risk	Don't Know
Number of ADLs	No
Number of IADLs	Not Assessed

**Insurance**

Medicaid #	123456789
Medicaid Policy #	
Medicare #	33344222A
Medical Assistance ID	

**User Fields** (Add New)

MFP Target Yes	(Edit)
----------------	--------

**Routes** (Add New)

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

**Current Care Recipients** (Add New)

**Current Contacts** (Add New)

**Current Care Enrollments** (Add New)

NFCE-PDA Waiver (Active) 11/30/2008 - None	(Edit)
Non-Caremanaged Services (Active) 11/05/2008 - None	(Edit)

**Current Service Suspensions** (Add New)

**Current Providers** (Add New)

Blair Senior Services, Inc. (11/05/2008 - None)	(Edit)
---	--------

**Current Caregivers** (Add New)

**1. Click CARE MANAGEMENT**

Start Date	End Date	Care Program	Primary Care Manager	Status	Reason	Total Cost
[Empty table body]						

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Refer...
- Consumer Journal

2. Clicking on **CARE MANAGEMENT** as demonstrated in Slide 2, opens the Care Management window

- Contents
- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Refer...
- Consumer Journal

### NHTCase, SAMPLE - Care Management

Start Date	End Date	Care Program	Primary Care Manager	Status	Reason	Total Cost
------------	----------	--------------	----------------------	--------	--------	------------

**3. Click  
NEW CARE PLAN**

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contr...

Consumers NHTCase, SAMPLE - Consumer

Close Consumer Save Save and Close New Care Plan Open Care Plan Delete Care Plan Copy Ca

NHTCase, SAMPLE 1012239090 10/12/1923 86 11/30/2008 - 05/31/2009 Caring Angel (All)

Contents NHTCase, SAMPLE - Care... **New Care Plan**

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

New Care Plan

Agency Filter	(All)
Primary Care Manager	Caring Angel
Provider Role	
Service Program	(Choose...)
Start Date	
End Date	
Status	
Reason	
Status Date	11/05/2008
Prior Authorization No.	

Comments

OK

Cancel

3. Clicking on **NEW CARE PLAN** as demonstrated in Slide 4, opens the New Care Plan window

4. Complete these Sections and Click **OK** when Finished

New Care Plan

Agency Filter	(All)
Primary Care Manager	Caring Angel
Provider Role	
Service Program	(Choose...)
Start Date	
End Date	
Status	
Reason	
Status Date	11/05/2008
Prior Authorization No.	

Comments

OK Cancel

FOR EXAMPLE

1. From the DROP DOWN MENU, choose the appropriate AGENCY

- Contents
- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Refer...
- Consumer Journal

NHTCase, SAMPLE - Care Plan

Start Date	End Date	Ca

New Care Plan

Agency Filter

Primary Care Manager	Allegheny County AAA
Provider Role	Armstrong County AAA
Service Program	Beaver County Office on Aging
Start Date	Perks County
End Date	Blair Senior Services, Inc.
Status	Bucks County AAA
Reason	Butler County AAA
Status Date	Cambria County AAA
Prior Authorization No.	

Comments

2. From the **DROP DOWN MENU**, choose the appropriate **NHT COORDINATOR** if it is not already populated

Contents NHTCase, SAMPLE

Start Date	End Date	Ca

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	Assessor One
Service Program	Bernice Newberry
Start Date	Brittany Peathers
End Date	Caring Angel
Status	Carol A Fenton
Reason	Carolyn Brumbaugh
Status Date	Debbie Knab
Prior Authorization No.	Duane Ehredt
	11/03/2008

Comments

OK

Cancel

3. From the **DROP DOWN MENU**, choose the appropriate **PROVIDER ROLE NHT COORDINATOR**

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
<b>Provider Role</b>	<b>NHT Coordinator</b>
Service Program	Assessor
Start Date	Care Manager
End Date	Primary Care Manager
Status	Protective Service Worker
Reason	
Status Date	11/05/2008
Prior Authorization No.	

Comments

OK Cancel

4. For **SERVICE PROGRAM**  
Click on the **ELLIPSIS** it will appear  
when you place the cursor in the  
Service Program field

Contents

NHTCase, SAMPLE

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

New Care Plan

Agency Filter	Blair Senior Services
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	(Choose...)
Start Date	
End Date	
Status	
Reason	
Status Date	11/05/2008
Prior Authorization No.	

Comments

OK

Cancel

5. Clicking on the ELLIPSIS, opens this window

Select Consumer Care Enrollment

	Level of Care	Service Program	Status	Start Date	End Date	
<input type="checkbox"/>	Not Applicable	Community Programs	Active	11/5/2008		Select
<input type="checkbox"/>	NFCE	NHT-Nursing Home Transition	Active	11/5/2008		Add New...

Edit... Cancel

**New Care Plan**

New Care Plan

Agency Filter Blair Senior Services, Inc.

Primary Care Manager Caring Angel

OK Cancel

**Select Consumer Care Enrollment**

	Level of Care	Service Program	Status	Start Date	End Date
<input type="checkbox"/>	Not Applicable	Community Programs	Active	11/5/2008	
<input checked="" type="checkbox"/>	NFCE	NHT-Nursing Home Transition	Active	11/5/2008	

Select Add New... Edit... Cancel

6. Enter (by clicking and making a check mark) the **LEVEL OF CARE NFCE NURSING HOME TRANSITION**

7. Click **SELECT** when finished

- Contents
- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Refer...
- Consumer Journal

NHTCase, SAMPLE - Care Plan

Start Date	End Date	Ca

Agency Filter Blair Senior Services, Inc.  
Primary Care Manager Caring Angel

**Select Consumer Care Enrollment**

	Level of Care	Service Program	Status	Start Date	End Date
<input type="checkbox"/>	Not Applicable	Community Programs	Active	11/5/2008	
<input checked="" type="checkbox"/>	NFCE	NHT-Nursing Home Transition	Active	11/5/2008	

Select  
Add New...  
Edit...  
Cancel

**8. For START DATE  
Click on the  
ELLIPSIS or manually enter**

Contents NHTCase, SAMPLE - Care Management

Start Date	End Date	Care Program	Primary	Status	Reason	Total Cost
------------	----------	--------------	---------	--------	--------	------------

**New Care Plan** [X]

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (Active)
Start Date	11/05/2008 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">...</span>
End Date	
Status	
Reason	
Status Date	
Prior Authorization No.	

Comments

Agency Filter	Blair Senior Services, D
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (Active)
Start Date	11/05/2008
End Date	05/04/2009
Status	
Reason	
Status Date	11/05/2008
Prior Authorization No.	

OK

Cancel

9. Manually enter the appropriate **END DATE** or click on the ellipsis to open the calendar

10. PLEASE NOTE: **END DATE** will automatically populate with a date six months from the **START DATE**. **MAKE SURE TO CHANGE IT TO THE LAST DAY OF THE PREVIOUS MONTH (if before the 16th) OR THE LAST DAY OF THE CURRENT MONTH (if after the 15th)**



11. Since the Start date in this scenario was before the 15<sup>th</sup> of the month, the end date will be April 30<sup>st</sup> rather than May 31. (Remember, the automatically populated end date was May 4)

## New Care Plan

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (Active)
Start Date	11/05/2008
End Date	04/30/2008
Status	
Reason	
Status Date	11/05/2008
Prior Authorization No.	

## Comments

Cancel

12. From the DROP DOWN MENU, choose the appropriate STATUS ACTIVE

Contents NHTCase, SAMPLE

Start Date	End Date

New Care Plan

Agency Filter	Blair Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (Active)
Start Date	11/05/2008
End Date	04/30/2008
Status	
Reason	
Status Date	Active
Prior Authorization No.	Inactive
	On Hold
	Waiting List

Comments

OK Cancel

13. From the **DROP DOWN MENU**, choose the appropriate **REASON** in this case, it would be **MFP** as the consumer fit all the criteria, is eligible and will participate in the Aging Waiver upon discharge

Agency	Services, Inc.
Primary Care Manager	Caring
Provider Role	NHT Coordin
Service Program	NHT-Nursing Home (Active)
Start Date	11/05/2008
End Date	04/30/2008
Status	Active
Reason	
Status Date	
Prior Authorization No.	Cap Exception Approved
Comments	

Current  
**MFP**  
Non-MFP  
Services My Way  
Supplementing FCSP

OK  
Cancel

Social Assistance Management System - [NHTCase, SAMPLE - Consumer]

File Edit View Tools Window Help

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

Consumers NHTCase, SAMPLE - Consumer

Close Consumer Save Save and Close New Care Plan Open Care Plan Delete Care Plan Copy Care Plan Print Preview Care Plan Print Care Plan Status Properties Properties

NHTCase, SAMPLE 1012239090 10/12/1923 86 11/30/2008 - 05/31/2009 Caring Angel (All)

Contents NHTCase, SAMPLE - Care Plan

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

**New Care Plan**

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (we)
Start Date	11/05/2008
End Date	04/30/2008
Status	Active
Reason	MRP
<b>Status Date</b>	<b>11/05/2008</b>
Prior Authorization No.	

Comments

Cancel

14. **STATUS DATE** automatically populates to the current date.

2 Items, 1 Selected

DDESANTIS SAMS2K\_99 11/4/2009 9:21 AM

15. Click  
OK  
when finished

New Care Plan

Agency Filter	Blair Senior Services, Inc.
Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NHT-Nursing Home Transition (Active)
Start Date	11/05/2008
End Date	04/30/2008
Status	Active
Reason	MFP
Status Date	11/05/2008
Prior Authorization No.	

Comments

OK Cancel



17. NOTE: The Care Program Period is shown here

NHTCase, SAMPLE - Care Plan Summary

Start Date	11/05/2008	<a href="#">Modify Care Plan...</a>
End Date	04/30/2009	
Prior Authorization No.		
Level of Care	NFCE	
Service Program	NHT-Nursing Home Transition	<b>Cost Cap Utilization</b>
Care Program	NHT-Nursing Home Transition	<b>Cost Cap</b> <b>Usage</b>
Status	Active	<b>Goal Statements</b>
Status Date	11/05/2008	<b>Worksheet Entries</b>
Reason	MFP	Completed                      0 entries

**Personal**

Full Name	NHTCase, SAMPLE	<b>Care Managers</b>
Client ID	1012239090	NHT Coordinator                      Caring Angel (Primary)
Home Phone	(814) 452-3665	<b>Diagnosis Codes</b>
Town	Altoona	
DOB	10/12/1923	
Age	86	

**Service Plan**

<b>Service</b>	<b>Monthly / Service Plan Duration</b>
None	

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports

Consumers NHTCase, SAMPLE - Consumer NHTCase, SAMPLE - Care Plan

Close Care Plan Save Save and Close Print Preview Care Plan Print Care Plan

NHTCase, SAMPLE 1012239090 10/12/1923 86 NFCE NHT-Nursing Home Transition 11/05/2008-04/30/2009 Caring Angel

18. Click **SAVE and CLOSE**

- Summary
- Worksheet
- Service Plan
- Calendar
- Goals
- Care Plan Journal
- Care Managers
- Diagnosis Codes

### NHTCase, SAMPLE - Care Plan Summary

Start Date	11/05/2008	<a href="#">Modify Care Plan...</a>
End Date	04/30/2009	
Prior Authorization No.		
Level of Care	NFCE	
Service Program	NHT-Nursing Home Transition	
Care Program	NHT-Nursing Home Transition	
Status	Active	
Status Date	11/05/2008	
Reason	MFP	

---

**Personal**

Full Name	NHTCase, SAMPLE
Client ID	1012239090
Home Phone	(814) 452-3665
Town	Altoona
DOB	10/12/1923
Age	86

---

**Service Plan**

<b>Service</b>	<b>Monthly / Service Plan Duration</b>
None	

---

**Cost Cap Utilization**

Cost Cap	Usage
----------	-------

---

**Goal Statements**

---

**Worksheet Entries**

Completed	0 entries
-----------	-----------

---

**Care Managers**

NHT Coordinator	Caring Angel (Primary)
-----------------	------------------------

---

**Diagnosis Codes**

Start Date	End Date	Care Program	Primary Care Manager	Status	Reason	Total Cost
11/05/2008	04/30/2009	NHT-Nursing Home Transition	Caring Angel	Active	MFP	

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities &amp; Refer...

Consumer Journal

1 Item, 1 Selected

DDESANTIS

SAMS2K\_99

11/4/2009

10:43 AM

19. Clicking on **SAVE and CLOSE** as demonstrated in [Slide 23](#), opens the Care Management window

NHTCase, SAMPLE - Care Management

Start Date	End Date	Care Program	Primary Care Manager	Status	Reason	Total Cost
11/05/2008	04/30/2009	NHT-Nursing Home Transition	Caring Angel	Active	MFP	

Contents

Summary

Details

Assessments

Care Management

Service Orders

Service Delivery

Activities & Refer...

Consumer Journal

1 Item, 1 Selected

20. This Screen will provide a history of Care Plans for the individual Participant.

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes R... Unit Distribution Invoices Payments

Consumers NHTCase, SAMPLE - Consumer

Close Consumer Save Save and Close New Care Plan Open Care Plan Delete Care Plan Copy Care Plan Print Preview Care Plan Print Care Plan Status Properties Properties

NHTCase, SAMPLE 1012239090 10/12/1923 86 Caring Angel (All)

21. Click  
SAVE and CLOSE

NHTCase, SAMPLE - Care Management

Start Date	End Date	Care Program	Primary Care Manager	Status	Reason	Total Cost
11/05/2008	04/30/2009	NHT-Nursing Home Transition	Caring Angel	Active	MFP	

22. You can modify the Care Plan at any time in the future by clicking **MODIFY CARE PLAN**

NHTCase, SAMPLE - Care Plan Summary

<ul style="list-style-type: none"> <li>Summary</li> <li>Worksheet</li> <li>Service Plan</li> <li>Calendar</li> <li>Goals</li> <li>Care Plan Journal</li> <li>Care Managers</li> <li>Diagnosis Codes</li> </ul>	Start Date	11/05/2008	<a href="#">Modify Care Plan...</a>	
	End Date	04/30/2009		
	Prior Authorization No.			
	Level of Care	NFCE		
	Service Program	NHT-Nursing Home Transition		
	Care Program	NHT-Nursing Home Transition		
	Status	Active		
	Status Date	11/05/2008		
	Reason	MFP		
	<b>Personal</b>			<b>Cost Cap Utilization</b>
	Full Name	NHTCase, SAMPLE		<b>Cost Cap</b> <b>Usage</b>
	Client ID	1012239090		
	Home Phone	(814) 452-3665		
	Town	Altoona		<b>Goal Statements</b>
	DOB	10/12/1923		
Age	86		<b>Worksheet Entries</b>	
<b>Service Plan</b>			Completed      0 entries	
<b>Service</b>	<b>Monthly / Service Plan Duration</b>		<b>Care Managers</b>	
None			NHT Coordinator      Caring Angel (Primary)	
			<b>Diagnosis Codes</b>	

Social Assistance Management System - [NHTCase, SAMPLE - Care Plan]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches

Consumers NHTCase, SAMPLE - Consumer NHTCase, SAMPLE - Care Plan

Close Care Plan Save Save and Close Print Preview Care Plan Print Care Plan

NHTCase, SAMPLE 1012239090 10/12/1923 86 NFCE NHT-Nursing Home Transition 11/05/2008-04/30/2009

Contents

- Summary
- Worksheet
- Service Plan
- Calendar
- Goals
- Care Plan Journal
- Care Managers
- Diagnosis Codes

NHTCase, SAMPLE - Care Plan Summary

**Edit Care Plan**

Start Date  
End Date  
Prior Authorization No.  
Level of Care  
Service Program  
Care Program  
Status  
Status Date  
Reason

**Personal**

Full Name  
Client ID  
Home Phone  
Town  
DOB  
Age

**Service Plan**

**Service**  
None

To modify the primary care manager, use the 'Care Managers' section of the care plan. The service program cannot be modified once a care plan has been saved.

<b>Primary Care Manager</b>	Caring Angel
<b>Provider Role</b>	NHT Coordinator
<b>Service Program</b>	NFCE/NHT-Nursing Home Transition (Active)
<b>Start Date</b>	11/05/2008
<b>End Date</b>	04/30/2009
<b>Status</b>	Active
<b>Reason</b>	MFP
<b>Status Date</b>	11/05/2008
<b>Prior Authorization No.</b>	

Comments

OK  
Cancel

23. Clicking on **MODIFY CARE PLAN** as demonstrated in Slide 27, opens this window

### NHTCase, SAMPLE - Care Plan Summary

**Contents**

- Summary
- Worksheet
- Service Plan
- Calendar
- Goals
- Care Plan Journal
- Care Managers
- Diagnosis Codes

Start Date	
End Date	
Prior Authorization No.	
Level of Care	
Service Program	
Care Program	
Status	
Status Date	
Reason	
<b>Personal</b>	
Full Name	
Client ID	
Home Phone	
Town	
DOB	
Age	
<b>Service Plan</b>	
<b>Service</b>	
None	

**Edit Care Plan**

To modify the primary care manager, use the 'Care Managers' section of the care plan. The service program cannot be modified once a care plan has been saved.

Primary Care Manager	Caring Angel
Provider Role	NHT Coordinator
Service Program	NFCE/NHT-Nursing Home Transition (Active)
Start Date	11/05/2008
End Date	04/30/2009
Status	Active
Reason	MFP
Status Date	
Prior Authorization No.	Cap Exception Approved
<b>Comments</b>	
MFP	
Non-MFP	
Services My Way	
Supplementing FCSP	

24. For Example:

# ***Basic Training for New SAMS Users***

## ***Nursing Home Transition***

### ***AGING NETWORK***

#### ***MODULE 4***

***END of MODULE 4. You will now be able to:***

**Add a *CARE PLAN* in SAMS**

**Remember, practice makes perfect. Ask your supervisor for access to the SAMS\_80 Database to practice what you learned in this module.**