

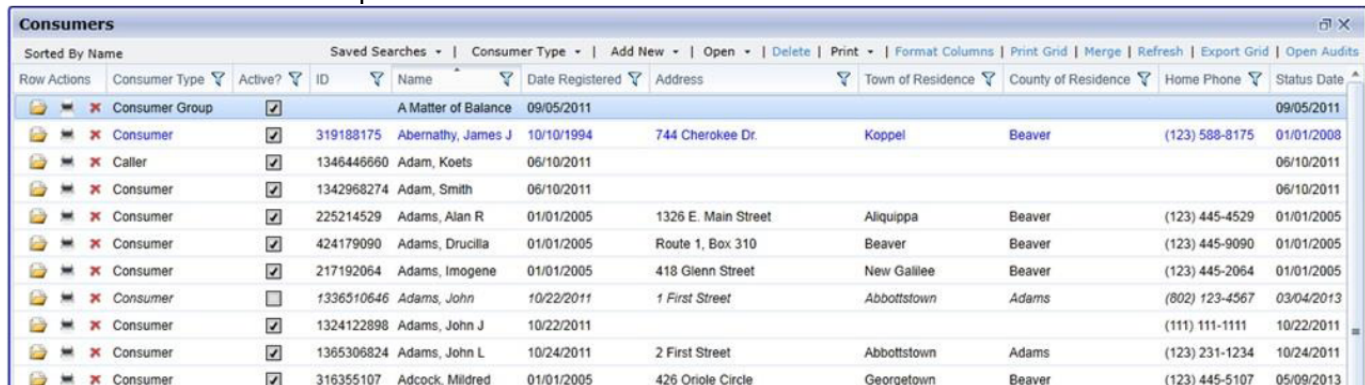
Adding a Consumer

SAMS allows users to add new consumers to receive services from the organization. To maintain data integrity and reduce duplicative data entry, SAMS automatically checks any new consumer to be added against existing consumers in the database. Depending on organizational security configuration, duplicate consumers may be displayed upon attempting to add a new consumer record.

► To add a new consumer

To access the Consumer list screen follow the steps below:

1. Click **Consumers** on the toolbar.
2. Consumer list view will open.



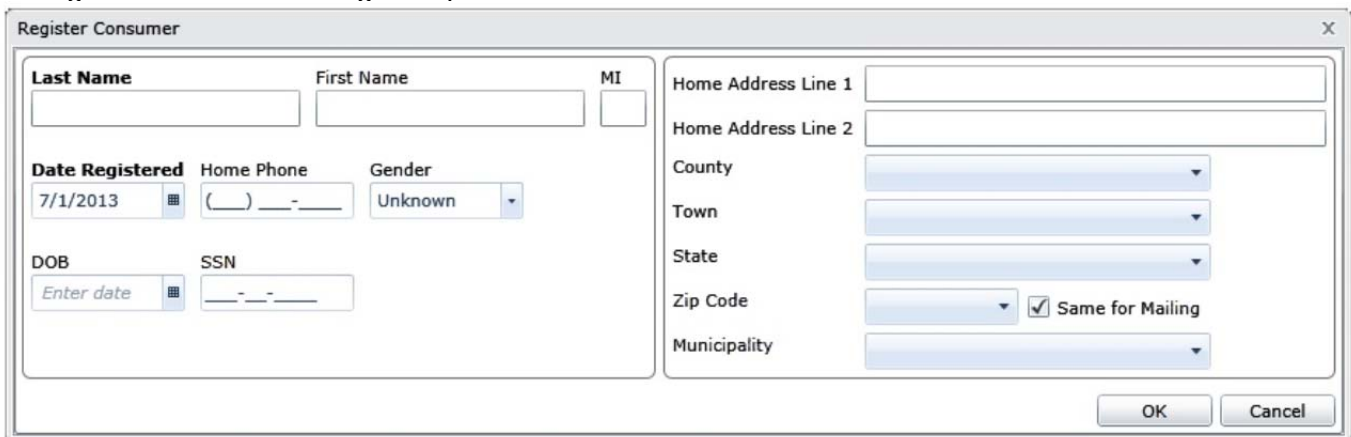
Row Actions	Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence	County of Residence	Home Phone	Status Date
	Consumer Group	<input checked="" type="checkbox"/>		A Matter of Balance	09/05/2011					09/05/2011
	Consumer	<input checked="" type="checkbox"/>	319188175	Abernathy, James J	10/10/1994	744 Cherokee Dr.	Koppel	Beaver	(123) 588-8175	01/01/2008
	Caller	<input checked="" type="checkbox"/>	1346446660	Adam, Koets	06/10/2011					06/10/2011
	Consumer	<input checked="" type="checkbox"/>	1342968274	Adam, Smith	06/10/2011					06/10/2011
	Consumer	<input checked="" type="checkbox"/>	225214529	Adams, Alan R	01/01/2005	1326 E. Main Street	Aliquippa	Beaver	(123) 445-4529	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	424179090	Adams, Drucilla	01/01/2005	Route 1, Box 310	Beaver	Beaver	(123) 445-9090	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	217192064	Adams, Imogene	01/01/2005	418 Glenn Street	New Galliee	Beaver	(123) 445-2064	01/01/2005
	Consumer	<input type="checkbox"/>	1336510646	Adams, John	10/22/2011	1 First Street	Abbotstown	Adams	(802) 123-4567	03/04/2013
	Consumer	<input checked="" type="checkbox"/>	1324122898	Adams, John J	10/22/2011				(111) 111-1111	10/22/2011
	Consumer	<input checked="" type="checkbox"/>	1365306824	Adams, John L	10/24/2011	2 First Street	Abbotstown	Adams	(123) 231-1234	10/24/2011
	Consumer	<input checked="" type="checkbox"/>	316355107	Adcock, Mildred	01/01/2005	426 Oriole Circle	Georgetown	Beaver	(123) 445-5107	05/09/2013

3. Click **Add New** in the page menu.

-OR-

Right Click anywhere on list to expose menu and select **Add New**.

4. Register Consumer Dialog will open.



Register Consumer

Last Name: First Name: MI:

Date Registered: Home Phone: Gender:

DOB: SSN:

Home Address Line 1:
Home Address Line 2:

County:
Town:
State:

Zip Code: Same for Mailing
Municipality:

OK Cancel

5. Enter consumer information. SSN is optional.

6. If you enter information in two fields for a consumer that matches information for one or more existing consumer records, depending on your agency's security configuration, you will be presented with possible matches when you click in a third field.

7. To begin editing the matched record, click the **Open** icon. A dialog will appear to confirm that you want to open the record and delete any information you may have entered. Click **OK** to open the Consumer Details page for the matched consumer. Click **Cancel** to return to the Register Consumer dialog.

8. If no matched records appear or the matched records do not match the new consumer, enter any additional information, and click **OK** to add the consumer and open the Consumer Details page. Click **Cancel** to return to the Consumer list view without adding the consumer.

9. Enter additional information in the Consumer Details screen. The Consumer Details tab or page displays the demographic, contact, and program enrollment and eligibility details for a specific consumer as well as other information about persons associated with the consumer, such as caregivers and contacts, and other information relevant to reporting requirements. At minimum, you must add at least one care enrollment.

Consumer - Abernathy, James J (319188175)

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | File Attachments | Journals | Routes | Service Deliveries | Service Orders

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Status Wizard | Merge | Add New

Basic Information [Open](#)

Name	James J Abernathy
A.K.A Name	Jimmy
Date Registered	10/10/1994
Consumer Details Last Reviewed	02/16/1998
Marital Status	Married
Gender	Male
Age	95
DOB	03/19/1918
SSN	123-45-8175
Information Release Authorized	Yes
Default Agency	Beaver County Office on Aging
Active	Yes
Status Date	01/01/2008

NAPIS

In Poverty?	Don't Know
Lives Alone?	No
High Nutritional Risk?	No
Is Rural?	No
Number of ADLs	0
Number of IADLs	7
NSIP Meal Eligible	Yes
NSIP Eligibility Type	Age (60 or Over)
Below 150% poverty level	Don't Know

Insurance

Medicare Eligible	No
Medicaid #	12345678

Care Enrollments [Add New](#) | [Open](#) | [Delete](#) | [Show All \(8\)](#)

MFP HCBS High Care	09/23/2011 - (Not Specified)	Active
Personal Care	(Not Specified) - (Not Specified)	Received
NAPIS - Title III	01/01/2009 - (Not Specified)	Active
Family Caregiver Support Program - Title III (e)	01/01/2005 - (Not Specified)	Active
Personal Care	(Not Specified) - (Not Specified)	Received
Elder Choices	01/01/2012 - (Not Specified)	Active

Care Managers [Add New](#) | [Open](#) | [Delete](#)

Suzie Swanson	01/01/2012 - (Not Specified)
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Care Recipients [Add New](#) | [Open](#) | [Delete](#) | [Open Care Recipient](#)

Jones, Mary (1380717104)	Beaver County Office on Aging
5/17/2010 - (Unspecified) [Federal]	Non-Relative

Caregivers [Add New](#) | [Open](#) | [Delete](#) | [Open Caregiver](#)

Smith, Roger (513574570)	Beaver County Office on Aging
(123) 445-4570	

The Consumer Details page is divided into two sections. The left side of the page displays identifying information, such as name, date of birth, and numeric identifiers; demographic information such as ethnicity and poverty status; and other information, such as information relevant to NAPIS and or state reporting. The right side displays detail subpages of information associated with the consumer, such as contact information like addresses and phone numbers; associated care givers, care recipients, and contacts; eligibility and enrollment information; and other information. Some detail subpages are available to add new information or edit existing information, and some are read-only. By default, detail subpages show a summary of information they contain. When opened, they expand to show detailed information in the specific record.

The information below is required for Title III or Alzheimer's Respite recipients:
Click OPEN next to Basic Information to enter the following:

- First Name** - Consumer's first name.
- Last Name** - Consumer's last name.
- Date Registered** - Date the consumer was first entered in the system. Defaults to current date upon add. This date must be prior to the date of the first service delivery
- Gender** - Consumer's gender. This is a required field, but dropdown defaults to "Unknown" on add.
- Birth Date** - Consumer's date of birth.
- Default Agency** – **This must be 6 Central Ohio Area Agency on Aging.**
- Active** - Indicates whether the consumer is actively being provided care by the organization. Typically, consumers no longer receiving services for a variety of reasons are inactivated, but not deleted or removed from the system. This is a global setting for the consumer record, not specific to individual providers or agencies. This field defaults to "Active" upon add. Deactivating a consumer must be confirmed by the user.

Ethnicity - Documents the Federal government ethnicity designation of Hispanic or non-Hispanic. Dropdown defaults to "Unknown" on add.

In Poverty - Documents consumer's poverty status for NAPIS reporting. Status defaults to "Don't Know" upon add.

Lives Alone - Documents, for NAPIS reporting, whether consumer lives alone. Status defaults to "Don't Know" upon add.

Is Rural - Documents, for NAPIS reporting, whether consumer lives in a rural area. Status defaults to "Don't Know" upon add.

Number of ADLs - Documents number of ADLs with which the consumer needs assistance. Defaults to zero upon add.

Number of IADLs - Documents number of IADLs with which the consumer needs assistance. Defaults to zero upon add.

Click **Add New** to enter the following required information:

Care Enrollments - SAMS will not save a new consumer record without at least one care enrollment (Alzheimer's Respite and/or Traditional OAA).

Ethnic Race - Documents information about the consumer's ethnicity and race. See "Ethnic Races" for more information.

Providers - Documents information about providers from which the consumer receives care. See "Providers" for more information.

10. Click **Save** to save consumer details and leave the consumer record open. Click **Save and Close** to save consumer details and close the consumer record and return to the Consumer list view. Click **Close** to close the consumer record without saving. Click **Add Next** to save the current consumer and add a new one.