

## Service Deliveries

Services delivered to consumers are documented in the Service Deliveries page of the consumer record. Service delivery may be documented by adding a service delivery in the consumer record.

The Service Deliveries list view contains a list of services delivered to or on behalf of consumers. Users access Service Deliveries to view and/or edit services that have been delivered, record delivery of new services, and delete services documented in error.

Several functions are available from the list view through the page menu. These functions are also available by right clicking anywhere in the list view. As with any page in SAMS, only those functions available to your user role and security permissions will be available.

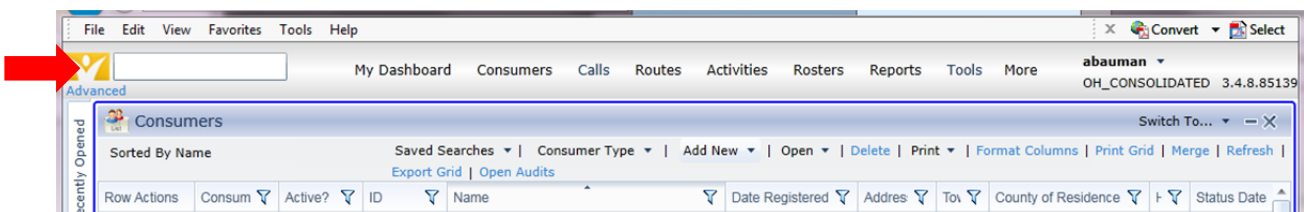
- ❑ **Add New** - allows users to add new service deliveries.
- ❑ **Open** - opens the selected service delivery record in edit mode (or read-only mode if user does not have edit privileges). Users can also open the record by clicking the Open icon under Row Actions in the selected list item. Users can also double click the list item to open the record. See *Editing a Service Delivery* for more information.
- ❑ **Delete** - deletes the selected record. If the user has delete access, the Delete icon will be available under Row Actions in the selected list item. See *Deleting a Service Delivery* for more information.
- ❑ **Copy** - creates a new service delivery record based on the selected record and opens it in edit mode. All fields are filled with the original record's data except Service Month (which is prompted before creating the record) and Units which defaults to 1. See *Copying a Service Delivery* for more information.
- ❑ **Other List Screen functions** - Format Columns, Refresh, and Exporting or Printing Lists are also available.

## Adding a New Service Delivery

The Add New button on the Service Deliveries list view page menu allows users to add new service deliveries to a single consumer.

► *To Create a New Service Delivery*

1. Click in the Search Box at the top of the page.



2. Enter the consumer's last name, first name.

3. Click on the consumer name. Note: Check the date of birth and county before selecting to make sure you have the correct consumer.

4. Click **Service Deliveries** tab.

5. List view will display all service deliveries for selected consumer.

Row Actions	Delivery Type	Care Program	Service	Agency	Provider	Type	Unit Price	Total Units	Service Cost
	Standard	Personal Care	Case Management	Beaver County Office on Aging	AAA Care Manager	1 hour	\$15.00	5.00	\$75.00
	Standard	Personal Care	Case Management	Beaver County Office on Aging	AAA Care Manager	1 hour	\$15.00	5.00	\$75.00
	Standard	Personal Care	Case Management	Beaver County Office on Aging	AAA Care Manager	1 hour	\$15.00	5.00	\$75.00
	Standard	Personal Care	Case Management	Beaver County Office on Aging	AAA Care Manager	1 hour	\$15.00	1.00	\$15.00
	Standard	Elder Choices	Case Management	Aging Services, Inc.	Aging Services, Inc.	1 hour	\$12.00	22.00	\$264.00
	Standard	Elder Choices	Case Management	Beaver County Office on Aging	Aging Services, Inc.	1 hour	\$12.00	93.00	\$1,116.00
	Standard	Elder Choices	Case Management	Beaver County Office on Aging	Aging Services, Inc.	1 hour	\$12.00	90.00	\$1,080.00

6. Click **Add New** to open the New Service Delivery edit screen.

6. Select **Delivery Type (Standard)** for **Care Program (Traditional OAA OR Alzheimer's Respite)**. These Care Programs are recorded under the consumer's detail screen **OR** Select **Delivery Type (To Caregiver)** for **Care Program (National Family Caregiver Program)**. This Care Program is recorded under the Caregiver's detail screen and the Care Recipient name must be entered

on the service delivery.

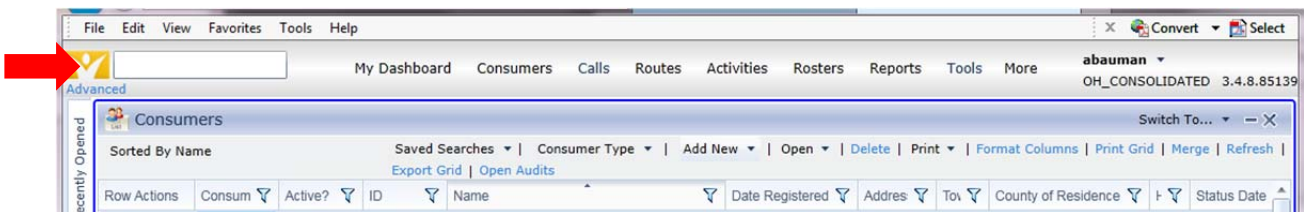
7. Enter **Agency (6\_Central Ohio Area Agency on Aging)**, and **Provider (Your organization)**
8. Select **Subprovider** and **Service Category** as applicable.
9. Select **Service** from dropdown. Only services allowed under the selected care plan are available. **Unit Price** will prepopulate with defined unit price for the service. NOTE: Adult Day Service is only for Title III, Alzheimer's Adult Day Service is only for Alzheimer's Respite etc.
10. Enter the number of units for the month.
11. Enter the Full Unit Rate from your budget, not the reimbursable rate.
12. Select the Fund Identifier (Title III-B, Title III-C1, Title III-C2, or Title III-E)
13. Click **Save and Close**

### Copying a Service Delivery

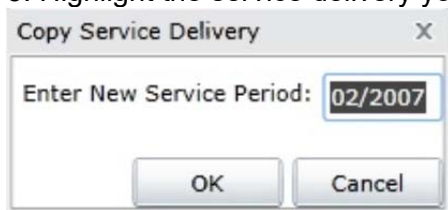
SAMS allows you to Copy an existing service delivery updating only the date of service. This is useful for Consumers or Consumer Groups that receive the same service on a monthly basis.

#### ► To Copy a Service Delivery

1. Click in the Search Box at the top of the page.



2. Enter the consumer's last name, first name.
3. Click on the consumer name. Note: Check the date of birth and county before selecting to make sure you have the correct consumer.
4. Click **Service Deliveries** tab. List view will display all service deliveries for selected consumer.
5. Highlight the service delivery you wish to copy and Click **Copy**.



6. Enter the **New Service Period** for the Service Delivery and click **OK**.
7. The new Service Delivery is displayed.
8. Modify any service fields as needed.
9. Click **Save** to save the record or **Save and Close** to save and close the record.