



Wyoming  
Department  
of Health



# Aging and Disability Database User Manual

## Aging Division, Community Living Section

*Last updated: 03/20/2023 by Maraia Rubin*

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To Begin: Training Meeting with A & D Manager  
Current A&D Manager-  
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**Set Up:**

1. If the user has a microphone, the user will use a computer to meet with the Aging and Disability manager. If the user does not have a microphone, they will have to call the Google Meets number and enter the pin.
2. Share your Screen on the Google Meets by pressing on the icon with the white box and the white up arrow. Click on Share Entire Screen.
3. Once screen share has started minus out of the current tab
4. Find Microsoft Edge on computer and pull it up
5. Go to the 2 emails from WellSky
6. Copy link for WellSky from the email and paste on Edge
7. Check for IE compatibility by the lock key on the search bar. If there is no IE compatibility icon, then work with the A & D manager to call WellSky.
  - a) The user needs to have administrator rights to the computer (*if user does not have it, they need to get in touch with the supervisor about this issue*)
8. Save the WellSky tab as a Bookmark in your Favorites on Microsoft Edge and add Today's Date into the Title
9. The user should be able to type in their assigned User ID which is emailed out to them in an email from WellSky.
10. The user should be able to enter a temporary password that is on the email from WellSky.
11. Enter new password
12. Input security questions
13. There are 6 sections to the main page: Application Links, WellSky News, Customer Quick Links, Customer News, WellSky Quick Links, and Application Support Resources.
14. Click on SAMS 3 on the Left Hand Side in the first box
15. Read through the notification that acknowledges that the user cannot share passwords without being held accountable.

**My Settings:**

Go to the icon with Person on Right Hand side- Go to my Settings:

1. Change default doc to AGNES Oct2021.afm **\*except\***,

**\*If the user enters in WyHS or Title III E then they should not add AGNES into their default settings for the default form because they have to do quarterlies.\***

2. On the "Info released authorized page" leave as NO as they may not have signed the AGNES
3. Module leave blank
4. Service plan is for Monthly rosters
5. Duration is monthly for 12 months
6. Change frequency to 12 months for reassessment details.
7. *Optional:* Add auto save feature to 10 minutes.

## *Searching and/or Adding a NEW Eligible Participant (Consumer)*

### *Searching for an Eligible Participant:*

1. The user will ALWAYS start with the search in the search bar where they will enter the consumer in three different ways:
  - Last Name, First Name
  - First name Last name
  - Date of Birth (DOB)
2. If the Eligible Participant is found, click on the person whom you have searched for.
3. When searching the client, the user needs to ensure the name, DOB, and county/town are aligned on the Details page.
4. If a DOB is not aligning with a searched consumer but the name, emergency contact, or the location are the same, then the Aging Needs Evaluation Summary (AGNES) might be filled out wrong. The user needs to contact the previous provider of the consumer popping up in the search in order to confirm the identity of the consumer.
5. If the consumer does not pull up after searching the three different ways, then follow the step on the *Add New Eligible Participant* section within this manual.

### *Add New Eligible Participant (Consumer)*

1. To add a new consumer, search the name in the search engine again, and then click Add Consumer at the bottom of the pop-up.
2. Enter the First and Last Name as well as the Gender and Date of Birth. The rest of the information from this page will be input when entering in the AGNES.
3. The Care Enrollments automatically enters a C1 Care Program that needs to be changed to the correct Care Program and start, received, status, and correct application date. The entry of a Care Enrollment will be discussed further within this manual.

## Older Americans Act (OAA) Programs, Take Out Meals, and Wyoming Home Services (WyHS)

### OAA Support Services- Title IIIB A&D Input:

1. Search for the consumer in the search bar on the left-hand side. The consumer needs to be age 60+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details Basic Information on the left-hand side, check if name, DOB, and active status are correct.
4. Care Enrollments is the next step. Add New if there is no NAPIS - Title III B no care plan required Care Enrollment. Service Program= NAPIS III B No care plan required. Application date: first date of month that the AGNES was signed. This date is the same for the Received Date, Status Date, and Start Date. The Status must be Active. Then Press OK.  
*\*If "COVID-19" or "IIIB COVID-19" is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment. \**  
*\*Random Care Enrollments that were inaccurate and discontinued in 2012 are: Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and/or end and terminate them on 12/31/2012.\**
5. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do NOT check "Is Default". The start date is the first day of the month that the AGNES was signed. Click Information Release Authorized and then click OK.  
*a. \*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
6. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New on the Details and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first day that the Care Manager started.
7. The next step is to input the AGNES within the Assessments tab on the top dark blue bar. Add New in Assessments. Form Filename: AGNES Oct2021. Care Program: NAPIS- Title IIIB. Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 1 year from the date of the current assessment. Press OK. Now Update the Agency Information. The type of assessment depends on if a IIIB assessment has been completed in the past. If there has been a IIIB assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Re-evaluation ". If there has not been a IIIB assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Initial Evaluation". Fill out the Applicant Information with the information on the AGNES, page 1 only. Save and Close after this section has been completed. **IF** the provider is providing **Chore** via IIIB pages 1-3 must be completed and entered. Review IIIB Policy and Procedures.
8. **CLS does not require a Care Plan Service Plan for IIIB. Most providers do not use a Care Plan Service Plan for IIIB but some providers do.**

**There is a roster for the Title IIIB Program.**

OAA Disease Prevention and Health Promotion Program- IIID A&D Input:

1. Search for the consumer in the search bar on the left-hand side. The consumer needs to be age 60+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details Basic Information on the left-hand side, check if name, DOB, and active status are correct.
4. Care Enrollments is the next step. Add New if there is no NAPIS - Title III D no care plan required Care Enrollment. Service Program= NAPIS III D No care plan required. Application date: first date of month that the AGNES was signed. This date is the same for the Received Date, Status Date, and Start Date. The Status must be Active.
  - a. Then Press OK.
  - b. *\*If "COVID-19" or "IIB COVID-19" is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are: Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and/or end and terminate it on 12/31/2012.\**
5. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do NOT check "Is Default". The start date is the first day of the month that the AGNES was signed. Click Information Release Authorized and then click OK.
  - a. *\*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
6. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first date of the month the AGNES was signed.
7. The next step is to input the AGNES within the Assessments tab on the top dark blue bar. Add New in Assessments. Form Filename: AGNES Oct2021. Care Program: NAPIS- Title IIID. Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 1 year from the date of the current assessment. Press OK. Now Update the Agency Information. The type of assessment depends on if a IIID assessment has been completed in the past. If there has been a IIID assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Re-evaluation ". If there has not been a IIID assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Initial Evaluation". Fill out the Applicant Information with the information on the AGNES. Save and Close after this section has been completed.

**There is a roster for the Title IIID Program.**

### OAA Nutrition Programs- Title III C1 & C2 A&D Input:

1. Search for the consumer in the search bar on the left-hand side. Please review the eligibility criteria of the C1 and C2 programs to determine whether an individual is eligible for the programs.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details Basic Information on the left-hand side, check if name, DOB, and active status are correct.
4. Care Enrollments is the next step. Add New if there is no NAPIS (C2 or C1) Care Enrollment. Service Program= NAPIS III (C1 or C2) No care plan required. Application date: first date of month that the AGNES was signed. This date is the same for the Received Date, Status Date, and Start Date. The Status must be Active.
  - a. Then Press OK.
  - b. *\*If "COVID-19" or "IIIB COVID-19" is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are: Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and and/or end and terminate it on 12/31/2012.\**
5. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do not check "Is Default". The start date is the first day of the month that the AGNES was signed. Click Information Release Authorized and then click OK.
  - a. *\*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
6. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first day of the month the AGNES was signed.
7. The next step is to input the AGNES within the Assessments tab on the top dark blue bar. Add New in Assessments. Form Filename: AGNES Oct2021. Care Program: NAPIS- Title (IIIC1 or C2). Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 1 year from the date of the current assessment. Press OK. Now Update the Agency Information. The type of assessment depends on if a III C1 or C2 assessment has been completed in the past.
  - a. If there has been a C1 assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Re-evaluation ". If there has not been a C1 assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Initial Evaluation".
  - b. If there has been a C2 assessment completed in the past, the assessment will be a "Title III C2 Re-evaluation ". If there has not been a C2 assessment completed in the past, the assessment will be a "Title III C2 Initial Evaluation".

Fill out the Applicant Information with the information on the AGNES. Press Save after the Applicant Information has been input and then fill out the Nutrition Risk Assessment section. Ensure that the Nutritional Risk Score at the bottom matches the score on the AGNES.

- a. **AGNESes for C1 should contain 2 pages (the Basic Client Information page 1 and the Nutrition Risk Assessment page 2).**
- b. **AGNESes for C2 should contain 3 pages (the Basic Client Information page 1, the Nutrition Risk Assessment page 2, and the ADLs and IDLs page 3). For C2 Assessments, the ADL/IADL section must be completed. This section does not need to be completed if the AGNES is for C1.** Ensure that the ADL/IADL scores match the scores on the AGNES. Save after this section has been completed.

**Nutrition Education is an Aggregate Count so please follow directions under the Entering Aggregate Data section when entering Nutrition Education.**

8. **CLS does require a Care Plan Service Plan for III C1 and C2.**  
Care Plans is the next step, and this tab can be found at the top middle of the page. Add New Care Plan. The Primary Care Manager Agency is the Wyoming State Division on Aging. The Primary Care Manager is your name. The Primary Care Manager Role is Care Manager. Click on the Green Arrow Box for Care Program and select NAPIS III C1 or NAPIS III C2. The Start Date is the first day of the month the AGNES was signed and the End Date is last day of the month of the following year. (For example the start date may be 9/1/2022 and the end date would thus be 8/31/2023). The Status is Active and the Status Date is today's date. Then press OK. Edit Care Plan Details on the Right-Hand Side of the Care Plan. Check and make sure that the Start and End Date are correct and check the box "Adjust Service Plan Dates Automatically".
9. Add New Service Plan. The Service Category and Service is according to what service was given. The Provider is your organization. The Start Date is the first day of the month the AGNES was signed. Add the Subservices on the right-hand side if subservices are specified. Press OK and Save and Close.
10. *\*If there is an existing non-expired care plan then you will add your service plan to that care plan for C1, C2, and/or E. Open up the existing Care Plan and Add New Service Plan. \* If you have any questions regarding a current Care Plan please call the A&D Coordinator.*
11. Add any Subservices if necessary.

**There is a roster for the Title IIIC1 and C2 Program. No Roster for Nutrition Education.**

Take Out Meals A&D Input:

1. Search for the consumer in the search bar on the left-hand side. The consumer needs to be age 60+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details Basic Information on the left-hand side, check if name, DOB, and active status are correct.
4. Care Enrollments is the next step. Add New if there is no Take Out Meals Care Enrollment. Change the application date to the first day of the month that the AGNES was signed. Select Service Program and Take Out Meals will appear to be selected. This date is the same for the Received Date, Status Date, and Start Date. The Status must be Active.
  - a. Then Press OK.
  - b. *\*If "COVID-19" or "IIIB COVID-19" is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are; Department of Transportation, Community Services, LTC Waiver or Local*

*Funding, WSSB – those are the five that show most often. The user must delete them and and/or end and terminate it on 12/31/2012.\**

5. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do not check "Is Default". The start date is the first day of the month that the AGNES was signed. Click Information Release Authorized and then click OK.
  - a. *\*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
6. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first day of the month the AGNES was signed.
7. The next step is to input the AGNES within the Assessments tab on the top dark blue bar. Add New in Assessments. Form Filename: AGNES Oct2021. Care Program: Take Out Meals. Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 1 year from the date of the current assessment. Press OK. Now Update the Agency Information. The type of assessment depends on if a Take Out Meals assessment has been completed in the past. If there has been a Take Out Meals assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Re-evaluation ". If there has not been a Take Out Meals assessment completed in the past, the assessment will be a "Title III B-C1-D-Takeout Meals Initial Evaluation". Fill out the Applicant Information with the information on the AGNES. Press Save after the Applicant Information has been input and then fill out the Nutrition Risk Assessment section. Ensure that the Nutritional Risk Score at the bottom matches the score on the AGNES. ***AGNESes for Take Out Meals should contain 2 pages (the Basic Client Information page 1 and the Nutrition Risk Assessment page 2).***
8. ***CLS does require a Care Plan Service Plan for Take Out Meals. Nutrition Education is an Aggregate Count so please follow directions under the Entering Aggregate Data section when entering Nutrition Education.*** Care Plans is the next step, and this tab can be found at the top middle of the page. Add New Care Plan. The Primary Care Manager Agency is the Wyoming State Division on Aging. The Primary Care Manager is your name. The Primary Care Manager Role is Care Manager. Click on the Green Arrow Box for Care Program and select Take Out Meals. The Start Date is the first day of the month the AGNES was signed, and the End Date is last day of the month of the following year. (For example, the start date may be 9/1/2022 and the end date would thus be 8/31/2023). The Status is Active, and the Status Date is today's date. Then press OK. Edit Care Plan Details on the Right-Hand Side of the Care Plan. Check and make sure that the Start and End Date are correct and check the box "Adjust Service Plan Dates Automatically".
9. Add New Service Plan. The Service Category and Service is according to what service was given. The Provider is your organization. The Start Date is the first day of the month the AGNES was signed. Add the Subservices on the right-hand side if subservices are specified. Press OK and Save and Close.
10. Add any Subservices if necessary.
11. *\*If there is an existing non-expired care plan then you will add your service plan to that care plan for Take Out Meals, C1, C2, and/or E. Open up the existing Care Plan and Add New Service Plan.\* If you have any questions regarding a current Care Plan please call the A&D Coordinator.*

**There is a roster for Take Out Meals. No Roster for Take Out Meals Nutrition Education.**



### Wyoming Home Services A &D Input

1. Search for the consumer in the search bar on the left-hand side. The consumer needs to be age 18+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details Basic Information on the left-hand side, check if name, DOB, and active status are correct.
4. Care Enrollments is the next step. Add New if there is no WyHS Care Enrollment. Service Program= WyHS. Application date: first date of month that the AGNES was signed. This date is the same for the Received Date, Status Date, and Start Date. The Status must be Active.
  - a. Then Press OK.
  - b. *\*If "COVID-19" or "IIB COVID-19" is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are; Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and and/or end and terminate it on 12/31/2012.\**
5. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do not check "Is Default". The start date is the first day of the month that the AGNES was signed. Click Information Release Authorized and then click OK.
  - a. *\*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
6. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first date of the month the AGNES was signed.
7. The next step is to input the AGNES within the Assessments tab on the top dark blue bar. Add New in Assessments. Form Filename: AGNES Oct2021. (If you are inputting a quarterly Assessment, please click the Form Filename: AGNES Quarterly Oct2021.afm). Care Program: WyHS. Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 1 year from the date of the current assessment. Press OK. Now Update the Agency Information. The type of assessment depends on if a WyHS assessment has been completed in the past. If there has been a WyHS assessment completed in the past, the assessment will be a "WyHS Re-evaluation ". If there has not been a WyHS assessment completed in the past, the assessment will be a "WyHS Initial Evaluation". Fill out the Applicant Information with the information on the AGNES. Press Save after the Applicant Information has been input and then fill out the Nutrition Risk Assessment section. Ensure that the Nutritional Risk Score at the bottom matches the score on the AGNES. Then press save. Then fill out the ADL/IADL, page 3, with the

information on the AGNES and ensure that the scores on Wellsky are the same as the scores on the ADL/IADL. Press Save and Close.

- a. ***\*The Quarterly WyHS Assessment will only ask you to review the Applicant Information and input the Quarterly ADL, IADL evaluations. You will only input page 4 (1<sup>st</sup> Qtr), 5 (2<sup>nd</sup> Qtr), or 6 (3<sup>rd</sup> Qtr) of the AGNES for a Quarterly\****
  - b. ***\*Quarterly Assessments need to be completed every 90 days. For example, if a full WyHS Assessment was done 1/15/2023, then a quarterly assessment needs to be completed in April, another quarterly needs to be completed in July, and the last quarterly needs to be completed in October.\****
  - c. ***\*If there was a Change in Status Form, then a full 3-page AGNES needs to be input into assessments. \****
8. Care Plans is the next step, and this tab can be found at the top middle of the page. Add New Care Plan. The Primary Care Manager Agency is the Wyoming State Division on Aging. The Primary Care Manager is your name. The Primary Care Manager Role is Care Manager. Click on the Green Arrow Box for Care Program and select WyHS. The Start Date is the first day of the month the AGNES was signed, and the End Date is last day of the month of the following year. (For example, the start date may be 9/1/2022 and the end date would thus be 8/31/2023). The Status is Active, and the Status Date is today's date. Then press OK. Edit Care Plan Details on the Right-Hand Side of the Care Plan. Check and make sure that the Start and End Date are correct and check the box "Adjust Service Plan Dates Automatically".
9. Add New Service Plan. The Service Category and Service is according to what service(s) is on the Service Plan. The Provider is your organization. The Start Date is the first day of the month the AGNES was signed. There will be more than one Service Plan. ***Case Management (Care Coordination) is a required Service to be entered for the WyHS program. Case Management CANNOT be the only service entered into the Service Plan.***
10. Add the Subservices on the right-hand side if subservices are specified. Press OK and Save and Close.

**There is a roster for the WyHS program. No Aggregate entries.**

## OAA Title III E National Family Caregiver Program A&D Input:

### **A. Caregiver Profile**

1. Search for Caregiver (all of information goes under caregiver) under Search bar. The caregiver needs to be age 18+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details on the left-hand side, check if name, DOB, and active status are correct.
4. Ensure that the NAPIS information within the Basic Information is correct. If not, open the Basic Information and update the NAPIS demographics. This information should be found on the Wyoming Family Caregiver Support Program Caregiver Information Form. The information that should be input to the Details page is the Gender, DOB, Ethnicity, Ethnic Race/Nationality, In Poverty, Lives Alone, and Primary Language. Scroll up when done and say OK.
5. Care Enrollments is the next step. Add new if there is no caregiver program already enrolled. Service Program= Family Caregiver Support, make sure that Care Program also states Family Caregiver Support. Application date: first date of month that the Caregiver Information Form was signed. This date is the same for the Received Date, Status Date, and Start Date
  - a. Then Press OK.
  - b. *\*If COVID-19 is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are: Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and and/or end and terminate it on 12/31/2012.\**
6. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do not check “Is Default”. The start date is the first day of the month that the Caregiver Information Form was signed. Click Information Release Authorized and then click OK.
  - a. If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.
7. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop-down menu. The start date is the first date of the month that services were started for this consumer.
8. Check Location – Confirm or add the Caregiver’s address.
9. Check Phone – Confirm or add the Caregiver’s phone(s).
10. Find Care Recipient field. If there is no field, then save the Details page. Go to Add New by the Details tab at the top. Add New Care Recipient. Search for the Care Recipient. Enter the Recipient relationship. Start Date: First date of month the Caregiver Information Form was signed. Family Caregiver Program Type: Federal. Press OK.
11. Care Plans is the next step, and this tab can be found at the top middle of the page. Add New Care Plan. The Primary Care Manager Agency is the Wyoming State Division on Aging. The Primary Care Manager is your name. The Primary Care Manager Role is Care Manager. Click on the Green Arrow Box for Care Program and select Family Caregiver Support Program. The Start Date is the first day of the month the Caregiver Information Form was signed and the End Date is last day of the month of the following year. (For example, the start date may be 9/1/2022 and the end date would thus be

8/31/2023). The Status is Active, and the Status Date is today's date. Then press OK. Edit Care Plan Details on the Right Hand Side of the Care Plan. Check and make sure that the Start and End Date are correct and check the box "Adjust Service Plan Dates Automatically".

12. Add New Service Plan. The Service Category and Service is according to what services are on the Service Plan. Be Careful to not add "NFPCP GRG" services to the service plan since those are for the Older Relative Caregiver program. The Provider is your organization. The Start Date is the first day of the month the Caregiver Information Form was signed or the date the services were added to the Service Plan during the Care Plan timeframe. There will be more than one Service Plan.

13. Add any Subservices if necessary. Press OK then Save and Close.

*\*If there is an existing non-expired care plan then you will add your service plan to that care plan for C1, C2, and/or E. Open the existing Care Plan and Add New Service Plan. \**

**Case Management (Care Coordination) is a required Service to be entered for the Family Caregiver Support Program. Case Management CANNOT be the only service entered into the Service Plan.**

**There is no Roster for the Title III E program.**

14. The next step is to enter the Service Deliveries for the Caregiver. Go to the Service Deliveries on the Eligible Participant's Profile. Add New. Care Program: Family Caregiver Support Program. Agency: Wyoming State Division on Aging. Enter the provider, service category, and service. The service month should be the month that the Caregiver received services. Enter the Units. Then Save

### **Care Recipient Profile**

1. Now Search the Care Recipient and check Basic Information for the Care Recipient (ensuring name, DOB, active are correct). The NAPIS information does not need to be entered in for the Care Recipient if an AGNES was filled out for the Respite/ Supplemental Services. If there was no AGNES filled out, please utilize the Wyoming Family Caregiver Support Program Caregiver Information Form to enter the basic information for the Care Recipient.
2. Care Enrollments- the services go under the Caregiver, but the care receiver still needs a care enrollment.
3. Make sure that the Caregiver is on the Details page. The Caregiver SHOULD automatically pull over to the Care Recipient's profile after adding the Care Recipient into the Caregiver's profile. If there is no Caregiver on the Details page, then please Add New up top and click on Caregiver. Then search for the caregiver and click on the corresponding caregiver. Enter Caregiver Relationship, Start Date (the day the Caregiver signed the Caregiver Information form), and you may click on \*primary caregiver.
  - a. \*Sometimes there are multiple Caregivers for the same Care Recipient. The Care Recipient can have up to three Caregivers. When there are multiple Caregivers, do not check any of the Caregivers as the primary Caregiver. \*
4. Ensure that the Provider section is correct.
5. The Care Recipient will have an AGNES to be input within Assessments **only if the Respite or Supplemental Services are being provided**. Add New in Assessments. Form Filename: AGNES Oct2021 (The Form Filename will be AGNES Quarterly Oct2021 if you are entering a Quarterly Assessment for this Care Recipient). Care Program: Family Caregiver Support Program. Agency: Wyoming State Division on Aging. Enter Provider. The date of the assessment is the date that the AGNES has been signed. The date of the next assessment is exactly 3 months from the date of the current assessment. Update the Applicant Information, Nutrition Risk Assessment, and the ADL/IADL and save between each input.

- a. *\*If there are already WyHS Quarterlies entered into the Assessments but there is no Title III E assessment yet, then the Care Recipient **may be** on WyHS. Go to Care Plan to see if there is a current WyHS Care Plan. No WyHS Care Plan= not on WyHS.*
- b. ***\*The Quarterly Assessment will only ask you to review the Applicant Information and input the Quarterly ADL, IADL evaluations. You will only input page 4 (1<sup>st</sup> Qtr), 5 (2<sup>nd</sup> Qtr), or 6 (3<sup>rd</sup> Qtr) of the AGNES for a Quarterly\****
- c. ***\*Quarterly Assessments need to be completed every 90 days. For example, if a full Assessment was done 1/15/2023, then a quarterly assessment needs to be completed in April, another quarterly needs to be completed in July, and the last quarterly needs to be completed in October.\****
- d. ***\*If there is a Change in Status Form, then a full 3-page AGNES needs to be input into assessments. See the Caregiver Policies and Procedures for rules on when a Change of Status Form is needed. \****

**The Care Recipient does not need any Care Plan/Service Plan for Title III E.**

6. Now search the Caregiver to ensure that the Care Recipient is showing up on the Details screen.

## **B. Older Relative Caregiver Profile (ORC)**

1. Search for Older Relative Caregiver (all of information goes under caregiver) under Search bar. The caregiver needs to be age 55+ to be eligible for this service.
2. Click on consumer and then the main page will pop up for that consumer.
3. In Details on the left-hand side, check if name, DOB, and active status are correct.
4. Ensure that the NAPIS information within the Basic Information is correct. If not, open the basic information and update the NAPIS demographics. This information should be found on the National Family Caregiver Support Program ORC Child Information Form. The information that should be input to the Details page is the Gender, DOB, Ethnicity, Ethnic Race/Nationality, In Poverty, Lives Alone, and Primary Language. Scroll up when done and say OK.
5. Care Enrollments is the next step. Add new if there is no caregiver program already enrolled. Service Program= Family Caregiver Support, make sure that Care Program also states Family Caregiver Support. Application date: first date of month that the ORC Child Information Form was signed. This date is the same for the Received Date, Status Date, and Start Date
  - a. Then Press OK.
  - b. *\*If COVID-19 is in Care Enrollments click on it and change status to inactive. Also, change the termination date to 9/30/2021 and end date to 9/30/2021. If it throws an error, go to Care Plans and find COVID-19 and open it up. Edit Care Plan Details and edit end date to 9/30/2021. Press OK and the Save and Close to be able to change the Care Enrollment.\**
  - c. *\*Random Care Enrollments that were inaccurate and discontinued in 2012 are: Department of Transportation, Community Services, LTC Waiver or Local Funding, WSSB – those are the five that show most often. The user must delete them and and/or end and terminate it on 12/31/2012.\**
6. Check Providers and ensure that the provider is listed. Add New Provider if the Provider is not listed. If there is no Provider section shown on the Details page, go to Add New under the Details tab and find Provider. Type in Provider in the Drop-down. Do not check “Is Default”. The start date is the first day of the month the ORC Child Information Form was signed. Click Information Release Authorized and then click OK.
  - a. *\*If the consumer has not received services for 3 years from the provider, the provider can be ended. No provider should be set to default.\**
7. Check Care Managers and ensure that the correct Care Manager is listed. If there is no Care Manager, Add New Care Manager. If there is no Care Manager section shown on

the Details page, go to Add New under the Details tab and find Care Manager. The Agency Filter is Wyoming State Division on Aging. Enter the Care Manager name by searching in the drop down menu. The start date is the first date of the month the ORC Child Information Form was signed.

8. Check Location – Confirm or add the Caregiver’s address.
9. Check Phone – Confirm or add the Caregiver’s phone(s).
10. Care Recipient(s) for the ORC Program are minors. Follow the \*ORC Care Recipient Profile listed below.
11. If there is no ORC Care Plan then Add New in Care Plans. When adding new care plan enter Level of Care: Federal Administration on Aging Programs, Service Program: Family Caregiver Support Program, Application Date: first day of the month that the ORC Child Information Form was signed (this date is the same for the Received Date, Status Date, and Start Date.) Edit Care Plan Details on the right side within Care Plans. Ensure that start date and end date is correct and click on Adjust service plan automatically. Then press OK. Edit Care Plan Details on the Right-Hand Side of the Care Plan. Check and make sure that the Start and End Date are correct and check the box “Adjust Service Plan Dates Automatically”.
12. Add New Service Plan. The Service Category and Service is according to what services are on the Service Plan. Be Careful to add “NFCP GRG” services to the service plan since those are for the Older Relative Caregiver program. The Provider is your organization. The Start Date is the first day of the month the Caregiver Information Form was signed or the date the services were added to the Service Plan during the Care Plan timeframe. There will be more than one Service Plan.
13. Add any Subservices if necessary. Press OK then Save and Close.
14. *\*If there is an existing non-expired care plan then you will add your service plan to that care plan for C1, C2, and/or E. Open the existing Care Plan and Add New Service Plan.*

**-Case Management (Care Coordination) is a required Service to be entered for the Family Caregiver Support Program. Case Management CANNOT be the only service entered into the Service Plan.**

**-There is no Roster for the Title III E ORC program.**

15. Service Deliveries for the ORC. Go to the Service Deliveries on the Eligible Participant’s Profile. Add New. Care Program: Family Caregiver Support Program. Agency: Wyoming State Division on Aging. Enter the provider, service category, and service. The service month should be the month that the ORC received services. Enter the Units. Then Save

**\*ORC Care Recipient Profile – they are usually minors and not in A&D**

1. Search the Care Recipient and check Basic Information for the Care Recipient (ensuring name, DOB, active are correct). The NAPIS information needs to be entered from the ORC Child Information Form.
2. Care Enrollments- the services go under the ORC but the care recipient still needs a care enrollment.
3. Make sure that the ORC is on the Details page. The ORC SHOULD automatically pull over to the Care Recipient’s profile after adding the Care Recipient into the Caregiver’s profile. If there is no ORC on the Details page, then please Add New up top and click on ORC. Then search for the ORC and click on the corresponding caregiver. Enter ORC Relationship, Start Date (first day of month the ORC Child Information Form was signed), and you can click on primary caregiver if you wish.
  - a. *\*Sometimes there are multiple ORC for the same Care Recipient. The Care Recipient can have up to three ORC. When there is multiple ORC, do not check any of the ORC as the primary ORC. \**
4. Ensure that the Provider section is correct.
5. **The Care Recipient WILL NOT have an AGNES to be input within Assessments.**
6. **The Care Recipient does not need any Care Plan/Service Plan for Title III E.**

7. Now search the ORC to ensure that the Care Recipient is showing up on the Details screen.

### Rosters

1. Click on Rosters on the Blue bar at the top
2. Click on the Name of the Roster Definition you are needing to enter service data for.
3. Ensure that under Roster Filters, the Include Inactive Consumers and Include Consumer Group says “no.” If they don’t say “no” change the field(s) to “no”.
4. Save and Close
5. Back the Roster Definitions, right click on the desired Roster Definition and enter the Month you are entering service data form.
6. The Roster Record will pop up. Enter the total units and/or the daily unit as indicated on My Senior Center report, ServTracker report, or your own individual records. After every 8 entries, please click Save.
7. If there are errors after you click Save, please review the consumers highlighted in red and search the consumer in the search bar. Check the Care Plan/Service Plan to ensure that the dates are correct and that the correct subservices were entered.

### Entering Aggregate Data – only for

- A. IIIB Public Information: Newsletter and Social Media
- B. C1 Nutrition Education, C2 Nutrition Education, and/or Take Out Meals Nutrition Education
- C. IIIE Caregiver and ORC Information: Newsletters, Public Education to Families, Group Education, and Health Fairs
  1. Click on Consumers at the Top
  2. Double Click on Consumer Group -Aggregate. You may have to search for Aggregate.
  3. Click on Service Deliveries
  4. Add New - Agency: Wyoming State Division on Aging, Enter Provider, Enter the Service Category and Service and ensure that the Service Month/Year is correct. Enter the Units (ie. number of unduplicated newsletters created during the month and/or the number of sessions of Nutrition Education created during the month) and Consumers Served is the estimated number of EPs who received the above information. Press Save and Close
- D. IIIE Caregiver and ORC Assistance – One on One Information on Services to Caregiver NFCP and/or One on One Information on Services to Grandparents
  1. Click on Consumers at the Top
  2. Double Click on Consumer Group -Aggregate. You may have to search for Aggregate.
  3. Click on Service Deliveries
  4. Add New - Agency: Wyoming State Division on Aging, Enter Provider, Enter the Service Category as NFCP Assistance, Enter the Service and Subservice(s) and ensure that the Service Month/Year is correct. The Units and Consumers Served are the same number for this aggregate entry. Press Save.

### When there is a Duplicate Eligible Participant

1. Search both participants that you believe to be duplicates and pull them up side by side.
2. Compare the DOB, name, location, providers, and emergency contact to ensure that they are both the same individual.
3. Send an email to [Aging-sams@wyo.gov](mailto:Aging-sams@wyo.gov)
4. On the email please state:
5. Merge (name and user ID of the participant with the most outdated service delivery dates) to (name and user ID of the participant with the most updated service delivery)

6. The first name should be the one that you are wanting to get rid of and the second name is the one that you are wanting to keep since it is the user that is most updated in the A&D system.

### Reports

*\*Every year the CLS staff will be sending you an FFY Title III and SFY WyHS Report List so you know which reports to run for each care program.\**

1. In SAMS go to Reports at the top.
2. Go to Agency Summary Reports
3. Find the needed report in Report Definitions and Double click
4. Go to Preview and click on the Drop Down
5. Press Adobe PDF

### Deactivating Consumers

Check for active providers, if you **are** the only provider, we can close the person or if the last service delivery from another provider is over 3 years, we can proceed. **\*If deceased and they have another provider on file who provided current services, check with the other provider to see if they agree that the person is deceased\* if they do then proceed.**

1. Click on Status Wizard on toolbar. Click on Deactivate and Close Consumer and then press Next. Input a reason from the dropdown menu.
2. Default STATUS date is always today, leave that be. The Default End Date is end of that service month, eg 7/31
3. Items to Edit: (check) ALL then press Next
4. Enrollment status box to INACTIVE
5. Care plan status box to INACTIVE
6. Apply End Date to Service Plan – Click Yes
7. Review changes before final
8. Click VALIDATE next to Modifications box
9. Review error messages and correct with care plan service plan
10. Validation passed click OK
11. If passed click on COMMIT
12. Click OK and close if successful
13. Check Details are inactive: EP, provider(s), care enrollments, and care manager(s).

**\*If they died in the same month closing, then wait until the following service month so that services can be entered if need. For example, if a person died in December, wait to end the participant until the reports have been run in January.\***