

Wyoming State Unit on Aging Guide to Mon Ami

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Mon Ami Definitions for Wyoming Implementation

Switching software systems not only involves learning a new system, but also learning a new language! Below we define some Mon Ami terminology to provide clarity during the onboarding and implementation process.

User Roles

In Mon Ami, users can be assigned a few different roles that give them special permissions:

- Case Manager: Users with the case manager role in Mon Ami can be assigned as a client's primary case manager, sign service authorizations, and sign care plans.
- Assigned Staff: Users with the assigned admin role in Mon Ami can be assigned as a client's primary admin for non-case management programs.

There are three other permission types: program-based permissions, site-based permissions, and individual permissions for specific actions. The features you have access to are based on the permissions set for you by your State System Administrator.

Other Useful Vocabulary

- Provider: All service units recorded in Mon Ami must have a "provider" that completed that service. A provider could be a senior center, an external agency, or an individual depending on the type of service and how the provider should be identified in reports.
- Site: A site is a sub-organization within the State Unit on Aging, such as a senior center. Administrators that are part of a site can use most of the tools available in the system, but only have access to the subset of clients and other data that have been tagged with their site. Administrators and clients are allowed to belong to more than one site if needed.
- Care Plan: A care plan in Mon Ami holds important information about a client and the services they should be receiving from external providers under a given program to meet their assessed needs. This includes service authorizations, an emergency contact, the care recipient for caregiver programs, and a case manager's signature.
- Service Authorization: A service authorization is a request for service that indicates the client authorized to receive services, a service type, the number of units authorized, the frequency of the service that is needed, the funding source that will be used, and the unit cost if applicable. Service authorizations for a client

within a particular program are grouped together on a care plan in Mon Ami. Service Authorizations can be sent to external providers or used internally.

- Service Definition: The name of a specific service that is offered by your program. Examples would be Personal Care and Assisted Transportation.
- Service Record: Service Records are how units of service are recorded in Mon Ami. A service record includes a date, service type, recipient (usually a specific client), number of units, funding source, provider, and program. Many reports are based on Service Records.
- SmartList: A SmartList is a list of clients that are expected to receive services from a provider within a program and funding source. The list can be generated based on active service authorizations or on a previous month's reported units ("service records"). The SmartList is used to enter service units for a specified list of clients.
- Service Record Generator: This tool allows you to report services for any program that you manage. You are able to report services for a specific client or aggregate service group for any given day and amount of services. Multiple clients can be reported at a time, but only for one service type.
- Recipient Group: A recipient group represents a subset of clients who receive services anonymously. These groups are used for reporting aggregate service numbers. See the [Service Definition Dictionary](#) for program specific recipient group names.
- Document Template: A document template is a placeholder for various documents that will be uploaded to the client profile. The template helps to standardize the naming of uploaded documents and facilitate reporting.
- Program Enrollment: A program enrollment is how to demonstrate a client's status within a specific program. The program enrollment will document the date that a client has been waitlisted, activated, stopped or other statuses for the program. Other information contained within the program enrollment includes the Case Manager or Assigned Staff for the client, the program score and funding source.
- Care Relationship: A care relationship is used to show the relationship between Caregivers and Care Recipients in Mon Ami. Both individuals need to have a client profile in Mon Ami to create the relationship. The relationship is created on the client profile of either individual in the Contacts section.

Updated AGNES Policy

The Aging Needs Evaluation Summary (AGNES) form is required annually for people receiving services through Title III and WyHS programs. The form contains three sections: Basic Information, Nutrition Risk Screening and ADL/IADL Screening. Below are the policies and procedures for completing this form.

Initial AGNES

When a client first requests services, an initial AGNES form must be completed and entered in Mon Ami. If the client already has a profile in Mon Ami with a current AGNES form, but is new to the site, a new copy is not needed.

If the client is missing pages required for their program such as the ADL/IADL, they will need to fill out a new complete copy. If an AGNES is filled out and then the provider discovers that a form already exists on the client's profile, they will create a new AGNES form with the most current information.

The form can be completed on paper first, but still must be entered into Mon Ami. When entering the form, set the expiration date to be one year from the completed date. No program or site should be set.

Signature Policy

When first completing the AGNES form, clients will be required to sign a Use of Information release statement. This can be done on page 1 of the AGNES document or the Use of Information Release Form found in Mon Ami. This must be a physical signature and can not be digitally signed.

The signed copy must be uploaded to the client's profile in Mon Ami under the Document Template named "Signed Information Release". No program, site or expiration date should be set. The Date Completed should be set as the date the document was signed. The signature only needs to be obtained and uploaded once. A physical copy of the document does not need to be saved.

Renewal

Renewal should be completed one year from the most recently completed AGNES form. When completing the renewal, no program or site should be set. Set the expiration date to be one year from the completed date.

Key Changes to Highlight

Many features of Mon Ami will feel unlike previous systems you have used. Below are some of the key differences that you will notice as you get settled in Mon Ami.

- ★ You have access to **unlimited administrator licenses**. Staff can use the system for entering data and recording services to help alleviate the burden on Data Specialists.
- ★ Service definitions are streamlined with **no sub-services categories**. This makes reporting services more efficient and standardized across the state.
- ★ Program Enrollments, formerly referred to as care programs, are not necessary for reporting services. **You can assign services to a client whether they are enrolled in a program or not**. This means there will be no exceptions lists during monthly reporting.
- ★ **Documents can be uploaded and stored on the client profile**. This will reduce the need for physical storage and make sharing documents with the state much easier. It also allows for updated signature requirements on AGNES forms and Care Plan documents.
- ★ **Waitlists will be maintained in Mon Ami** rather than on paper forms. This information will be accessible by the state, eliminating the need for monthly reporting.

Program Workflows

In this section we will document some of the standard operating procedures in Mon Ami. It will cover many of the main tasks involved in all programs.

New Client Intake

When you first receive a new client, you can search for them in Mon Ami using their name, phone number or email address. If they already exist in the system at another site you will see a limited view of their profile. You can then adopt the client to your site in order to begin delivering services. If necessary, complete the AGNES form according to the updated policy.

See articles:

- How to create a new client
- How to create a new document
- How to adopt a client to a new site

Program Enrollments

Program enrollments are a useful tool for managing program rosters, waitlists and client statuses. However, program enrollments are not necessary in order to record services for a client. Program enrollments are only required for clients in the III-E and WyHS programs.

Program enrollments have different statuses related to the client's standing in the program. This can be helpful for tracking a client's history in the program such as their start date. Also, program enrollments are necessary for creating and maintaining your waitlist in Mon Ami.

See articles:

- How to create a program enrollment
- How to manage a program enrollment

Recording Services

Mon Ami has several tools to help sites report their services by the 15th of every month for the previous month. The main tool for reporting is the Smartlist. The Smartlist allows you to download a list of relevant clients, attach service records, and upload directly into the system. Smartlists should be used for reporting services for individuals.

The Service Record Generator is used primarily for Aggregate count services. In this method you can select all the relevant program, service, funding source and date connected to the service. This tool is best used for reporting aggregate numbers or small groups of people.

Additional tools include the bulk uploader and case notes which will be used for some III-E and WyHS services.

See Articles:

- How to upload a Smartlist
- How to enter service records
- How to add units to a case note
- How to report aggregate service counts

Reports

Reports in Mon Ami can be used for managing program operations and for reporting services to the State. Site managers will see a limited set of reports based on their site affiliations and permissions.

Service Record reports will show all necessary statistics such as unduplicated client counts and unit counts. These reports can be filtered by program, service definition and time period. They will take the place of the traditional A&D report that is sent with billing.

III-E and WyHS Program Specific Workflows

Evaluations and Assessments

Forms for Initial Evaluation, Follow Up Evaluation, Quarterly Evaluation and Re-evaluation Renewal will be entered into the digital copy on the client's profile. When creating these documents, set the relevant program, site and expiration date. Units for these services will be documented in Case Notes on the client's profile.

WyHS participants must complete an Income Verification form and upload it to the profile. Then set the contribution level in the "WyHS Sliding Fee Schedule" field on the client's profile.

Care Plan Creation and management

Clients receiving services in the III-E and WyHS programs are required to have a Care Plan. *For III-E programs, Care plans should be created on the Caregiver's profile.* All Care Plans should be set to expire 12 months after the start. Create service authorizations only for services you expect the client to receive during their care plan. The Care Plan does not need to be signed by the client.

Suspensions, Change of Status and Termination will all be documented on the Care Plan in Mon Ami. When these events happen, create a case note to document the reason and add a unit of Follow-Up Contact. These Documents do not need to be signed by the client.

A Program Transfer Letter will be sent by providers to clients when needed. It will then be uploaded to the client profile including the program, site and date completed. Then set an end date for the client's Care Plan. If there is not a new provider taking over services, set the client's program enrollment to "Finished".

Service Definition Dictionary

Title III-B Support Services

Note: for aggregate services use the Recipient Group named III-B Aggregate Recipients

Service Definition	Unit Type
Health Education	Occurrence
Health Exercise	Activity
Health Treatment and Prevention	Occurrence
Clubs/Group Activities	Occurrence
Games	Activity
Crafts	Occurrence
Shoppings	Per round trip
Chores	1 hour
Education/Trainings	Session
Counseling	Occurrence
Crisis Intervention	Occurrence
Information and Assistance	Per contact (aggregate)
Nutrition Counseling Referral	Contact
Outreaches	Contact (aggregate)
Newsletter	1 unit, # of consumers (aggregate)
Social Media	1 unit, # of consumers (aggregate)
Volunteering	Occurrence
Transportations	1-way trip
Assisted Transportations	1-way trip

Title III-C1 Congregate Nutrition

Note: for aggregate services use the Recipient Group named III-C1 Aggregate Recipients

Service Definition	Unit Type
Breakfast	Meal
Lunch	Meal
Evening	Meal
Frozen	Meal
Volunteer Meal	Meal (aggregate)
C1 No AGNES Meal	Meal (aggregate)
Nutrition Education	Session (aggregate)
Nutrition Counseling	Session
C1 Emergency Meals	Meal
C1 Take Out Meals	Meal
C1 Take Out Nutrition Education	Session (aggregate)
C1 Take Out Nutrition Counseling	Session

Title III-C2 Home Delivered Nutrition

Note: for aggregate services use the Recipient Group named III-C2 Aggregate Recipients

Service Definition	Unit Type
HDM Frozen Meal	Meal
HDM Hot Meal	Meal
HDM Volunteer Meal	Meal (aggregate)
Test Meal	Meal (aggregate)
Nutrition Education	Session (aggregate)
Nutrition Counseling	Session
C2 Emergency Meals	Meal
C2 Take Out Meals	Meal
C2 Take Out Nutrition Education	Session (aggregate)
C2 Take Out Nutrition Counseling	Session

Health Promotion Evidence Base III-D

Note: for aggregate services use the Recipient Group named III-D Aggregate Recipients

Service Definition	Unit Type
Bingocize	Session
Tai Chi	Session
CDSMP	Session

Title III-E National Family Caregiver Program

Note: for aggregate services use the Recipient Group named III-E NFCP Aggregate Recipients

Service Definition	Unit Type
Assistance	Contact
Group Education	1 activity : Aggregate client count
Health Fairs	1 activity : Aggregate client count
Newsletters	1 activity : Aggregate client count
Public Education	1 activity : Aggregate client count
Outreach	1 activity : Aggregate client count
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Nursing Medication Setup	Hourly
Nursing Assessment	Hourly
Nursing Delegation	Hourly
Nursing Reassessment	Hourly

Individual Counseling for Caregivers	Session
Caregiver Support Groups	Session
Training of Caregivers	Session
Loan Closet	Unit
Volunteers	Hourly
Care Plan Services (requires service authorization)	
In-Home Respite	Hourly
Adult Day Care Respite	Hourly
Assisted Living Respite	Hourly
Institutional Respite	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit
Caregiver Transportation	One way trip
Assisted Transportation	One way trip
Assistive Devices	Unit
Chore	Hourly
Caregiver Home Delivered Meals	Meal
Homemaking services	Hourly
Incontinence Supplies	Occurrence
Minor Home Modifications	Occurrence
Personal Care	Hourly

Title III-E Older Relative Caregiver

Note: for aggregate services use the Recipient Group named III-E ORC Aggregate Recipients

Service Definition	Unit Type
Assistance	Contact
Group Education	1 activity : Aggregate client count
Health Fairs	1 activity : Aggregate client count
Newsletters	1 activity : Aggregate client count
Public Education	1 activity : Aggregate client count
Outreach	1 activity : Aggregate client count
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Individual Counseling for Caregivers	Session
Caregiver Support Groups	Session
Training of Caregivers	Session
Care Plan Services (requires service authorization)	

In-Home Respite	Hourly
Out of Home Respite	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit
Assisted Transportation	One way trip
Assistive Devices	Unit
Chore	Hourly
ORC Home Delivered Meals	Meal
Homemaking services	Hourly
Incontinence Supplies	Occurrence
Minor Home Modifications	Occurrence
Personal Care	Hourly

Wyoming Home Services

Service Definition	Unit Type
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Nursing Delegation	Session
Nursing Reassessment	Session
Nursing Assessment	Session
Care Plan Services (requires service authorization)	
Personal Care	Hourly
Homemaker	Hourly
Chore	Hourly
In-Home Respite	Hourly
Assisted Living Respite	Hourly
Institutional Respite	Hourly
Adult Day Care/Health	Hourly
Hospice	Hourly
Home Repair	Occurrence
Medication Management	Hourly
Volunteer	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit

Helpful Links

Training Materials

- [Testing Checklist](#)

How to Videos

- [System Overview](#)
- How to: Program Enrollments & Managing the Waitlist
- [How to: Care Plans and Service Authorization](#)
- [How to: Entering Case Notes](#)
- How to: Document Management
- How to: Using Reports
- How to: Information & Referrals
- How to: Documenting and Reporting Services
 - ◆ Smartlists
 - ◆ Manual tool
 - ◆ Bulk Uploads

Recordings of Trainings

- III-B Program Overview, November 18 - <https://youtu.be/rVFMK8Ys-oo>

[Mon Ami Training: Overview-III B Program - 2024/11/18](#)

[13:42 MST - Recording](#)

- III-C1/C2 Programs Overview, November 19 - <https://youtu.be/B-gQvZLYXRw>

[Mon Ami Training: Overview-C1/C2 Programs - 2024/11/19 13:37 MST - Recording](#)

- III E & WyHS Programs Overview, November 20 - <https://youtu.be/9ltVKE4HVlQ>

[Mon Ami Training Overview- III E and WyHS Programs - 2024/11/20 13:36 MST - Recording](#)

- III D Program Overview, November 22 - [Mon Ami Training Overview- III D Program - 2024/11/22 08:44 MST - Recording](#)

Recordings of Office Hours:

- System Basics, December 3rd- [Mon Ami Office Hours: System Basics - 2024/12/03 13:40 MST - Recording](#)
- Title IIIIE and WyHS, December 4th- [Mon Ami Office Hours: Title IIIIE and WyHS - 2024/12/04 13:43 MST - Recording](#)
- Reporting Services, December 11th- [Mon Ami Office Hours: Reporting Service - 2024/12/10 13:32 MST - Recording](#)
- Using Reports, December 17th - [Mon Ami Office Hours: Using Reports - 2024/12/17 13:45 MST - Recording](#)
- General Office Hours, December 19th- [Mon Ami General Office Hours - 2024/12/18 13:51 MST - Recording](#)

Help Center Articles

These articles in the Help Center show step by step instructions for completing tasks in Mon Ami. The Help Center can be accessed by clicking “Help” on the left hand navigation menu in Mon Ami. Note that you will need to be logged in to use the links below.

→ Clients

- ◆ [Creating a New Client Profile](#)
- ◆ [Editing Client Profile Information](#)
- ◆ [Changing a Client’s Status](#)
- ◆ [Adding or removing a site from a client’s profile](#)
- ◆ [Adopting a client](#)
- ◆ [Creating a new caregiver/care receiver relationship](#)
- ◆ [Adding a contact or caregiver relationship](#)

→ Program Enrollments

- ◆ [Adding a program enrollment](#)
- ◆ [Editing and Ending a program enrollment](#)

- ◆ [Adding assigned staff/case manager to Program Enrollment](#)
- ◆ *Waitlist Functions (feature under development)*
 - *Add someone to waitlist*
 - *Manage reason/service*
 - *Remove someone from the waitlist*
- Care Plans and Service Authorizations
 - ◆ [How to create a new care plan](#)
 - ◆ [Ending a care plan early](#)
 - ◆ [Creating service authorizations](#)
 - ◆ [Editing the end date of service authorizations](#) (suspending services)
 - ◆ [Duplicating a care plan](#)
 - ◆ [Adding signatures to a care plan](#)
- Case Notes
 - ◆ [Creating a basic note](#)
 - ◆ [Creating a case note](#)
 - ◆ [Pinning a case note](#)
 - ◆ [Creating an incident note](#)
- Documents
 - ◆ [Creating and duplicating fillable assessments](#)
 - ◆ [Uploading a document](#)
- Reports
 - ◆ [Viewing, Filtering, Downloading Reports](#)
- Smartlists
 - ◆ [Smartlists Overview](#)
 - ◆ [Adding and Removing Clients](#)
 - ◆ [Uploading a Smartlist](#)
 - ◆ [Undoing a Smartlist upload](#)
- Service Record Creation
 - ◆ [For individuals and For aggregate groups](#)
 - ◆ [Bulk upload](#)
- [Information and Referrals Overview](#)