

# SAMS MOBILE ASSESSMENT AT-A-GLANCE REFERENCE GUIDE

06-22

This guide is an At-A Glance document. Mobile Assessments is a feature that allows you to conduct assessments in the field with almost any type of mobile device without having to go through the import/export process.

There are two documents (Mobile Assessments – Companion Guide and Mobile Assessments Training Guide) available on the Portal under Application Support Resources.

## **SECTION I – Mobile Assessments 101**

There are two ways to make a consumer available off-line for use with Mobile Assessments. The first section will review the process when you are in A&D/SAMS.

### **1. Login to WellSky Portal**

- A. Go to WellSky Portal on the internet (<https://portal.wellsky.com>)
- B. On the Portal page go to Application links and find SAMS 3.
- C. Click on SAMS 3
- D. You will see an application login screen
  - a. Enter SAMS Username (assigned by DAIL)
  - b. Enter SAMS Password (assigned by DAIL)

### **2. Find a Consumer in SAMS**

- A. Find the consumer(s) you need to assess in the ***Consumer list***, do not go into the Consumer record itself.
- B. Click once on the record you need then right click with the mouse to get a box of options. Click on Make Available Offline.
- C. The screen will refresh and there will be a check mark in the box in the column titled Offline? These check marks let you know which consumers have been made available to view and assess in the field.

### **3. Find a Consumer in Mobile Assessments**

- A. On the Portal page go to Application links and find Mobile Assessments.
- B. Click on Mobile Assessments.
- C. A login screen will prompt you for a login. These are the same credentials you use when logging into SAMS 3.
- D. At this point, create a shortcut to your desktop or favorites bar for easy access in the future.
- E. The automatic default of Search will present. Type in the name of the consumer you are looking for.
- F. Once the record(s) show up and you see the client you need to make available offline, click the down arrow to the right of the blue box labeled Open.
- G. Click the choice of Make Available Offline. The page will refresh and the cloud/arrow symbol will appear next to the blue box. (Any records displaying a black cloud with a down arrow in it denote a record that has already been made available offline).

You can now log off and are ready to conduct assessments in the field.

## **SECTION II –Mobile Assessments 101**

### **1. Mobile Assessments in the Field**

- A. Click on the Mobile Assessments shortcut. Generally, you are not connected to the internet at this point.
- B. A login screen will prompt your sign in. Enter your **Portal** login password then click Submit.
- C. The default screen will appear. At this point, click on the Downloaded option in the blue tool bar.
- D. Clients made available offline earlier will display.
- E. You can now either choose to open the client record by clicking on Open to the right of the consumer information or you can click the down arrow to get the options of New Assessment or Remove from device.
- F. When you open the record, the most recent 5 assessments are displayed. You have the options of opening the assessment or (by clicking on the down arrow) options to Copy, Print, Delete or Check Out.
- G. Once in the consumer record/assessment, complete it as you normally would and Save or Save As and close if you have more clients to assess.

### **2. Mobile Assessments on the Network**

- A. Once you return from the field and you login to the Portal, open Mobile Assessments. You should be connected to the internet at this point.

- B. Login using your A&D/SAMS username and password.
- C. Once you login, the default screen displays with a Notifications alert in red. Click on the Notifications tab to show which clients you worked with.
- D. Click Save if you are done with the client.
- E. All the clients made available offline will remain in the Downloaded section until removed. This can be done as a group or individually.
- F. Close out of Mobile Assessments by using the “x” on the tab.
- G. Click on SAMS 3 in the Portal and log in as you normally would.

When you return to the Consumers you worked on offline, you will find the assessments and modifications you made are now in A&D/SAMS.

### **Problem Solving**

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