Definitions:

DASHBOARD - The Dashboard is a screen in SAMS that can be set as a "start page" and used for a quick overview of consumer information useful to a SAMS user, case manager and supervisor. It consists of widgets (task widgets and saved search reports) that can be added, deleted, or moved around the dashboard.

Dashboards exclude consumers who are in Inactive status. Only Active records appear.

WIDGET – This a panel on the dashboard,

There are 2 types of widgets:

- a. Task Panels: (these cannot be modified and show only clients associated with SAMS user who is a care manager of the clients)
 - My Activities Due
 - My Care Plans Expiring
 - My Consumers Assigned
 - My Assessments Due

b. Saved Search Panels (there are 10 saved search widgets that can be used to show mini reports on the dashboard. These reports are not limited to only clients associated with the SAMS user who is a care manager of the client.

SAVED SEARCH – This is a little custom report that can be created and placed on the dashboard in a widget. Currently there are only 3 types of Saved Search reports available: Activities, Consumers, and Services

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1. Login to Harmony Portal and SAMS

- Go to Harmony Portal on the internet (https://login.harmonyis.net)
- You will see the Harmony Customer Portal Login page
- Enter Agingnetwork Username and Password (assigned by Harmony)
- On the portal page go to Application links and find SAMS 3
- Click on SAMS 3
- You will see an application login screen
 - o Enter SAMS Username (assigned by DAIL)
 - o Enter SAMS Password (assigned by DAIL)

2. Set the Dashboard as Start Page

- Go to My settings by clicking the drop down by your login name on any SAMS screen
- Click on My Settings
- In the Default Setting section click on the dropdown for Module
- Choose Dashboard by clicking on it
- Click Save and Close

This setting will take you to your the dashboard every time you login to SAMS

3. View the Dashboard

- Click the "My Dashboard" button
- The dashboard will be empty (no widgets) if you have not used it before. Your dashboard can be configured by adding widgets to your dashboard, selecting saved searches to put in your widgets and by formatting the columns of widgets you want to see

4. Configure Dashboard -columns

- When on the Dashboard screen click on the Columns button
- You will see a dropdown of choices 1,2,3,4,5. Choose the number of columns of widgets that you want.

5. Configure Dashboard -Add a Widget

• When on the Dashboard screen Click the "Add Widget" button

- Choose a Widget from the dropdown by clicking on (a task widget such as Activities due, assessments due, , care plans expiring, recent consumers assigned) or a saved search widget (activity, consumer, or service)
- If you choose a saved search widget select the widget you want by clicking on a choice the drop down list.
- The widget will appear in the dashboard panel.
- To minimize the saved search list click on the pin icon in the saved search box. This unpins it from your screen

6. Print or Export Widget (add saved search to a widget)

- Click the "Print Grid" button to print the list of clients in the widget
- Click the Export Grid button to export the list of clients
- In the "save in:" box browse to the directory you want to save the file in.
- In the" file name:" box choose Excel from the drop list

7. Move Widgets on the Dashboard

- Hold down the left mouse button on the header line of the widget you want to move
- Move your mouse to where you want to put the widget and let go of the left mouse button.

8. Create a Saved Search

- Click "Saved Searches" on the toolbar
- Choose Saved Search Type (Activity, Consumer or Service)
- Open a new Saved Search
- Fill in the following items in the criteria for the custom search.
 - o **Title**: This is the name of your custom search.
 - Shared With: Filling in this field will place security on your search.
 Once you enter "Agency", "Provider" or "State Unit" you can choose who the search can be viewed by on the next line.
 - Shared With Organization: Chose the organization that will be allowed to see this Saved Search.
 - o d. **Modifications Allowed**: This controls the permissions the users allowed to view the search will have. For example, if "(All)" is chosen, any changes can be made to the search. If "(None)" is chosen, no changes may be made to the search.
 - Choose Columns: Click the arrow to the left of (Search Results).
 A grey box will appear with a file icon to the right, when you click this icon, a dialog box will appear which will allow you to select columns that will be shown in the resulting search. For Custom

Searches, it is recommended that the following Columns are chosen:

- Client ID
- County
- Full Name
- Primary Care Manager
- Town

9. Reading an ALERT

- Put an ALERT on your dashboard by configuring a widget for an ALERT
- Click the "Add Widget" button when in an open widget
- Choose a Widget type of saved search-activity type from the dropdown
- Choose a saved search name by clicking on a choice in the drop down list. Example" LTCCC ALERT sent Barre"
- The saved search report with ALERTS will appear in the widget box
- Double click on the ALERT to open it
- After reading the ALERT and dealing with it, change the status to ALERT read or Completed and it will no longer be on your dashboard but the ALERT will still be in the clients record of activities.

10. Sending an ALERT

- An ALERT is sent by creating an activity on a client
- Open the consumer record.
- Open the Activity & Referrals section
- Click "Add New"

Subject: this is free text so give the Activity/Referral a subject title. For routine ALERTS such as "UR completed", "Clinical Certification done" we should be consistent in the protocol for subject name. If the ALERT is intended for a specific person at the Agency you should put that person's name as the first word in the subject. This way the user can filter the ALERT list for just their name.

Action: Use the drop down menu to select the appropriate action that needs to be taken. For example an ALERT sent to the BARRE LTC would be the action of LTCCC ALERT sent to Barre.

Agency: This is the agency creating/sending the alert. For LTCCCs the Agency is Department of Aging and Disabilities.

Status: alert sent (or else it won't show on dashboard)

Status date: auto populates

Comments: Enter any other information in the Comments box, such as instructions, actions needed etc.

If the other information is needed, such as start date, due date or follow up date it can be filled in, if not, leave it blank. Click save and close.

Appendix 1:

Tables of Saved Searches ALERTS

ALERTS

ALERTS are special activities defined by DAIL that we use to send messages about consumers to other Agencies. The activity of ALERT is part of the client's record as an activity. Each Agency and certain DAIL groups should have a defined Activity (Action) for ALERTS. If there is an "n" in the active box it means this agency is not using SAMS and so the ALERT is not active to be used for that Agency.

Action/Activity to create an ALERT	Saved Search to put in a widget		
Action/Activity to create ALERT	Active	Saved Search to put on widget	
AAA ALERT COASEV	y	COASEV ALERT SENT	
AAA ALERT CVAA	y	CVAA ALERT SENT	
AAA ALERT CVCOA	y	CVCOA ALERT SENT	
AAA ALERT NEVAA	y	NEVAAA ALERT SENT	
AAA ALERT SVCOA	y	SVCOA ALERT SENT	
ARIS ALERT	y	ARIS ALERT SENT	
ASP ALERT	У	ASP ALERT SENT	
CEC A 1			
CFC Appeal	У		
CFC WWW Appeal	У		
DAIL ALERT SAMS Admin	У	DAIL ALERT SAMS Admin SENT	
DINE REEKT STANS RAIMI	y	DAIL ALLKI SAMS ACHINI SERVI	
HHA ALERT ACHHH	y	HHA ALERT ACHHH (Addison County HH	
HHA ALERT BAHHA	n		
HHA ALERT CHHC	y	HHA ALERT CHHC (Caledonia HH)	
HHA ALERT CVHH	y	HHA ALERT CVHH (Cent VT HH)	
HHA ALERT DNA	n		
HHA ALERT FCHHH	у	HHA ALERT FCHHH (Franklin County HH	
HHA ALERT LHHA	y	HHA ALERT LHHA (Lamoille HH)	
HHA ALERT MHS	n		
HHA ALERT NCHCH	n		
HHA ALERT OEVNA	Y	HHA ALERT OEVNA (Orleans Essex VNA	
HHA ALERT PNS Bayada	у	HHA ALERT PNS Bayada (Bayada HH)	

HHA ALERT RAVNAH	У	HHA ALERT RAVNAH (Rutland VNA
HHA ALERT SVHC	n	
HHA ALERT VNA-VNH	y	HHA ALERT VNA-VNH (VNA VT and NH
HHA ALERT VNAofCHGI	y	HHA ALERT VNA-CHGI (Chittenden-GI
LTCCC ALERT Barre	y	LTCCC ALERT Barre SENT
LTCCC ALERT Bennington	у	LTCCC ALERT Bennington SENT
LTCCC ALERT Brattleboro	у	LTCCC ALERT Brattleboro SENT
LTCCC ALERT Burlington	у	LTCCC ALERT Burlington SENT
LTCCC ALERT Hartford	у	LTCCC ALERT Hartford SENT
LTCCC ALERT Middlebury	у	LTCCC ALERT Middlebury SENT
LTCCC ALERT Morrisville	у	LTCCC ALERT Morrisville SENT
LTCCC ALERT Newport	у	LTCCC ALERT Newport SENT
LTCCC ALERT Rutland	у	LTCCC ALERT Rutland SENT
LTCCC ALERT Springfield	y	LTCCC ALERT Springfield SENT
LTCCC ALERT St Albans	У	LTCCC ALERT St Albans SENT
LTCCC ALERT St Johnsbury	У	LTCCC ALERT St Johnsbury SENT
LTCCC ALERT Supervisors	y y	LTCCC ALERT Supervisors SENT
LICCE ALLKI Supervisors	y	LIECE ALLKI Supervisors SLIVI
MNG ALERT	у	MNG ALERT SENT
OPG ALERT Dave Ramos	y	OPG ALERT Dave Ramos
OPG ALERT General	У	OPG ALERT General
OPG ALERT Jackie Rogers	y	OPG ALERT Jackie Rogers
OPG ALERT Karen Hawley	y	OPG ALERT Karen Hawley
OPG ALERT Kate Hoover	у	OPG ALERT Kate Hoover
OPG ALERT Mike Attley	У	OPG ALERT Mike Attley
OMANERT		OM ALERT GENT
QM ALERT	У	QM ALERT SENT
TBI ALERT BAYADA	у	TBI ALERT BAYADA
TBI ALERT Choice Support Services	у	TBI ALERT Choice Support Services
TBI ALERT CSAC Community Associates	у	TBI ALERT CSAC Community Associates
TBI ALERT Eagle Eye Farm	y	TBI ALERT Eagle Eye
TBI ALERT Head Injury & Stroke	•	
Independence	y	TBI ALERT HSIP
TBI ALERT Health Care Rehab Services		TBI ALERT Health Care Rehab Services
(HCRS)	У	(HCRS)
TBI ALERT Northwest Counseling & Support	y	TBI ALERT NCSS
TBI ALERT Pride Inc	y	TBI ALERT Pride Inc
TBI ALERT Riverview Life Skills Center	у	TBI ALERT Riverview Life Skills Center
TBI ALERT Rutland Mental Health	y	TBI ALERT Rutland Mental Health
TBI ALERT Sterling Area Services	y	TBI ALERT SAS
TBI ALERT TBI Program Staff	y	TBI ALERT TBI Program Staff alert SENT
TBI ALERT VNACHGI	у	TBI ALERT VNACHGI
TBI ALERT VNAVNH	у	TBI ALERT VNAVNH
TBI ALERT Washington County Mental		TBI ALERT Washington County Mental
Health	У	Health
Transition II AI EDT		Transition II AI EDT CENT
Transition II ALERT	У	Transition II ALERT SENT