Software Help Sheet 9:

Scanning Service Deliveries

into SAMS

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Creation Date: 07/15/08

Last Revised: 07/21/08

Version: 2.0

CSS Administration Only

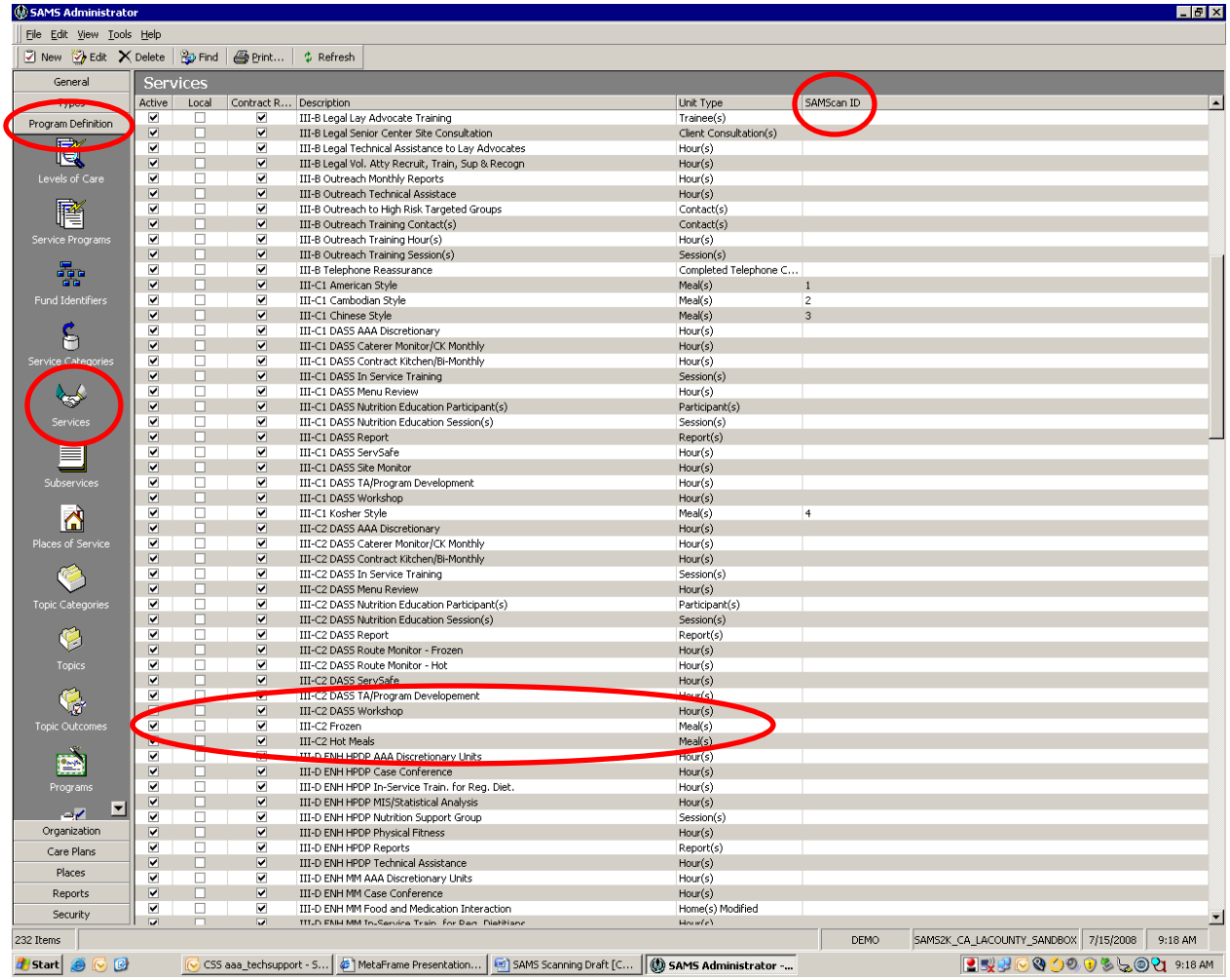
I. Setting Up SAMScan ID for Service Delivery via scanning.

A. Select SAMS Administrator from the SAMS Production Folder.

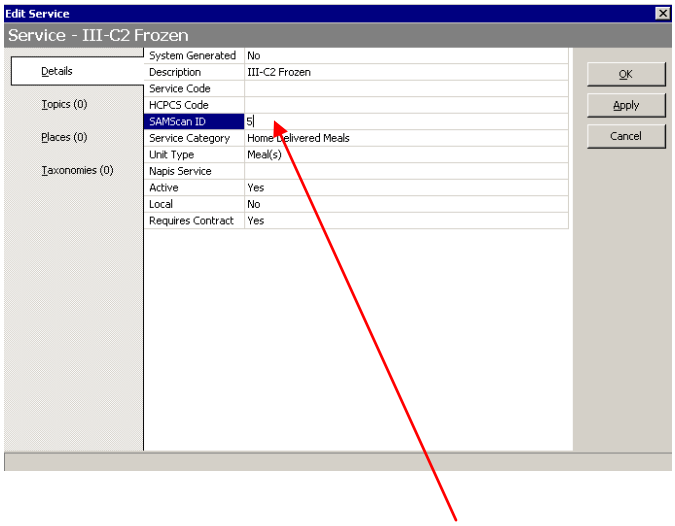
B. Select Program Definition.

C. Select Services.

D. SAMScan ID is in the right column, all SAMScan ID number must be unique.



E. Select Service III-C2 Frozen.



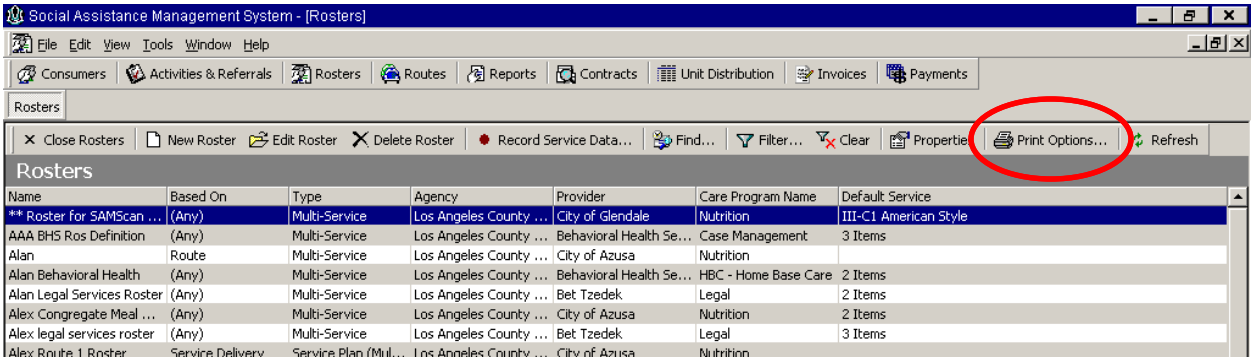
F. You will see the Edit Service pop-up window, type “5” into the SAMScan ID field. III-C1 American Style was already assigned “1”, Chinese “3”, Kosher “4” so the next unique number would be “5”. The unique number must be for all services that are to be scanned regardless of category, Nutrition, Care Management etc.

G. Exit SAMS Administrator.

II. SAMS Congregate Meal Roster

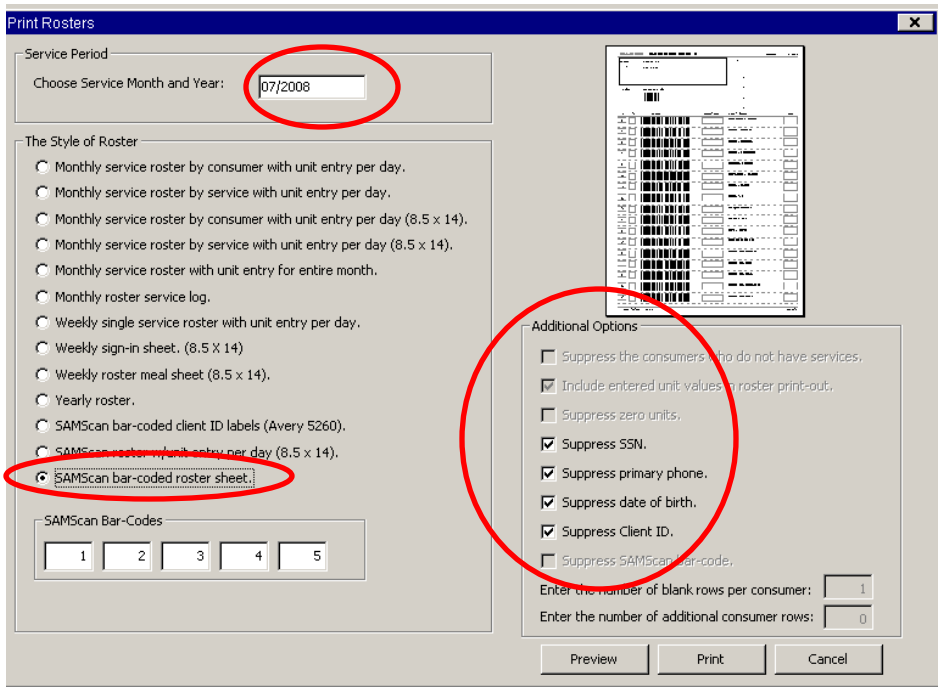
A. Refer to and use Helpsheet #7 Building Rosters to Record Congregate Meal Service Deliveries.

B. Print the Congregate Meal Roster by highlighting the roster ("**Roster for SAMScan" in this example, but would be the roster you created under step II.A.)



C. Select the "Print Options" button.

D. You will now have the "Print Rosters" window displayed.



E. Choose the Service Month and Year.

F. Under “The Style of Roster” Select “SAMScan bar-coded roster sheet”. This will produce a ‘daily’ congregate meal roster. Do not use the SamScan roster w/unit entry per day, CSS requires a “daily” roster.

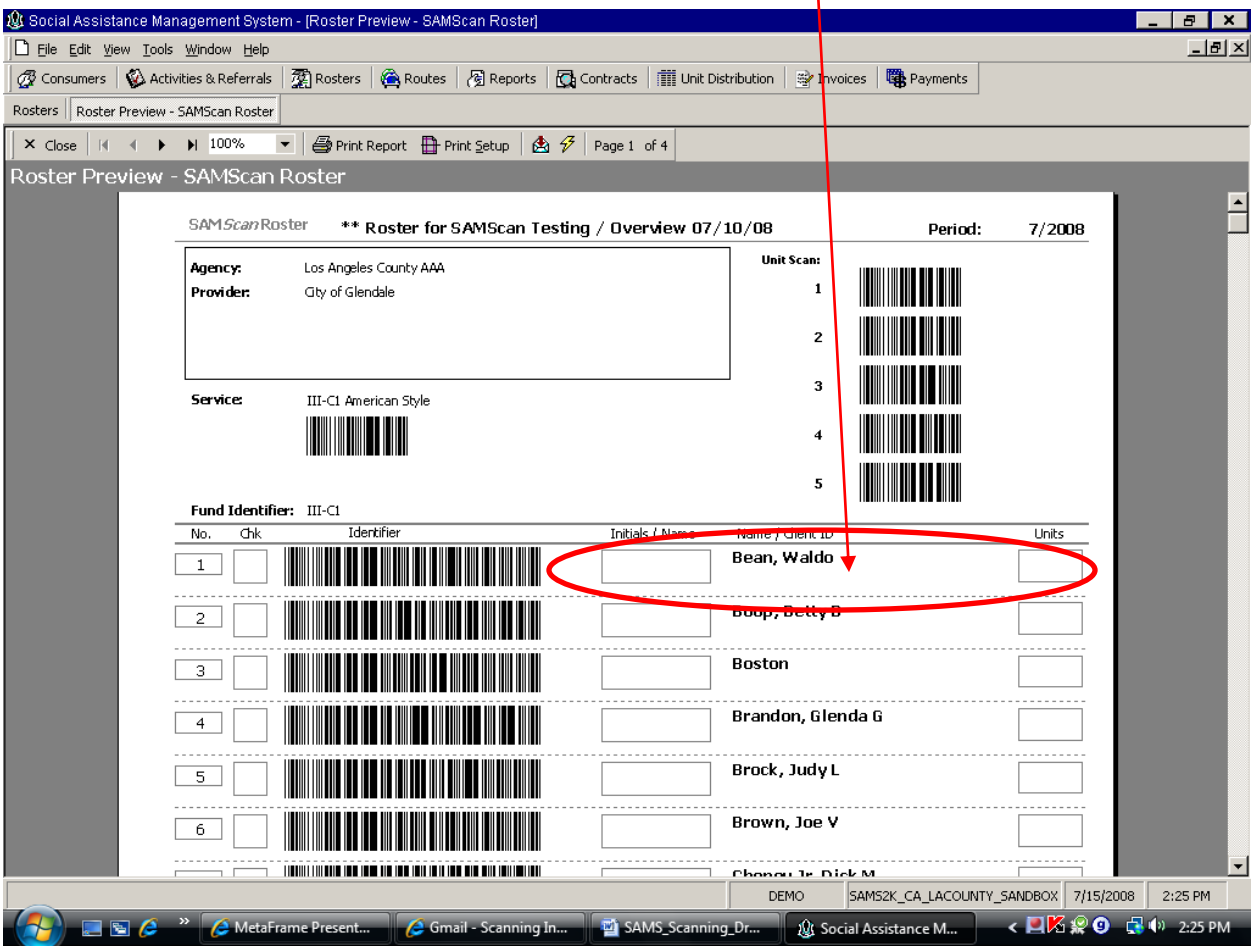
G. Make sure the “Additional Options” are checked to match the previous screen example.

H. Select the “Preview” button.

I. Print the “SAMScan bar-coded roster sheet”, which also is the sign-in roster. Have the consumer sign their name in the area that is marked initials or beside their name. The label is incorrect and the sign-in roster requires a **signature not just initials.**

J. Deliver services and then return the “SAMScan bar-coded roster sheet” for scanning into SAMS.

Sample of what the roster looks like is on the following “Preview” screen.

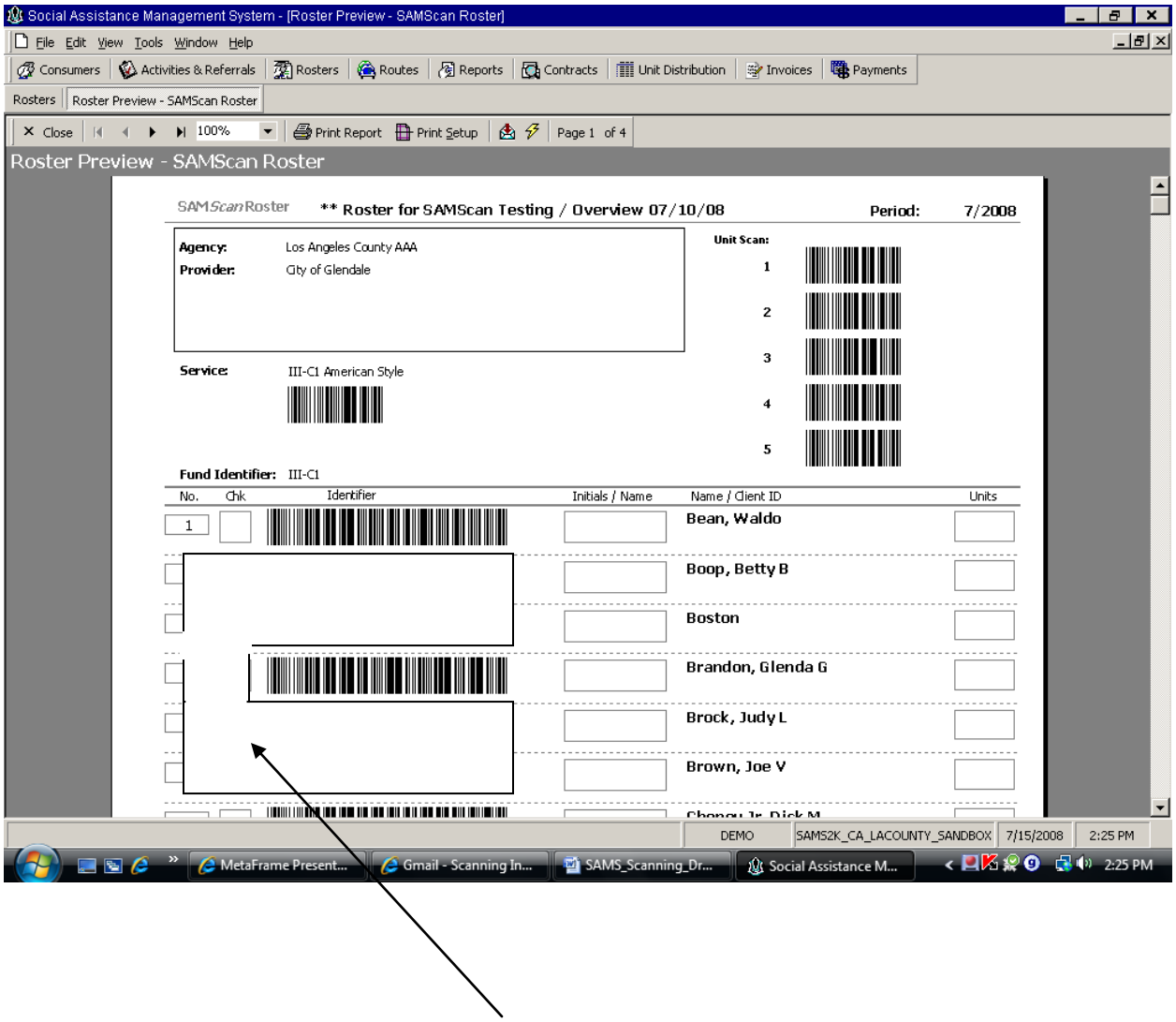


Note:

Barcodes need to have clear black and white lines to work properly. If you barcodes “bleed” black ink into the white bars, or if you have difficulty scanning the barcodes then change the paper type or printer used to print the barcoded rosters.

Tip:

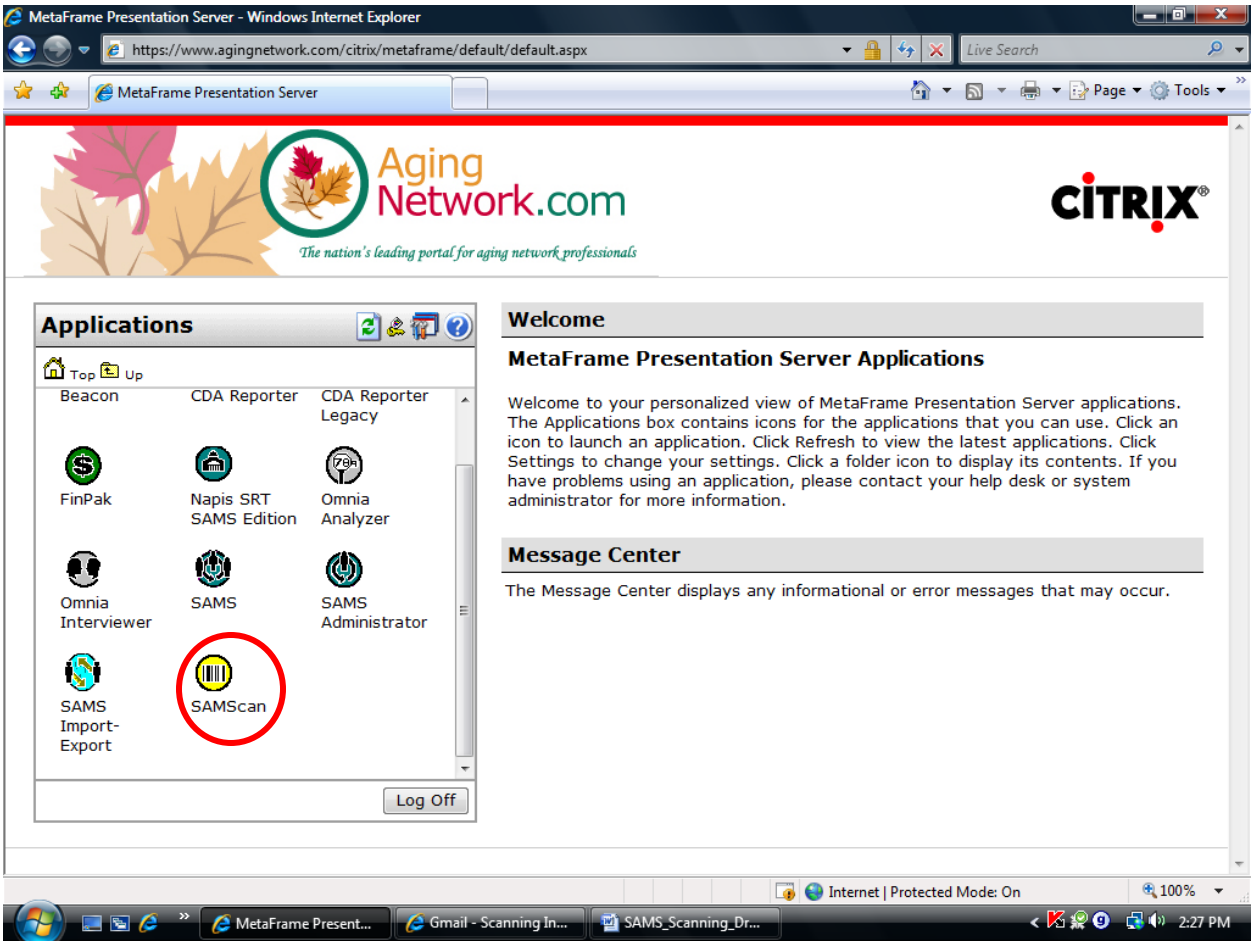
To make scanning of the barcoded roster easier, take a 3” X 5” or 5” X 7” index card and cut out a .5 inch by 3” half way down on the right side. Use this cards as a mask so that the barcode above and below on a roster are not scanned in error while scanning meals.



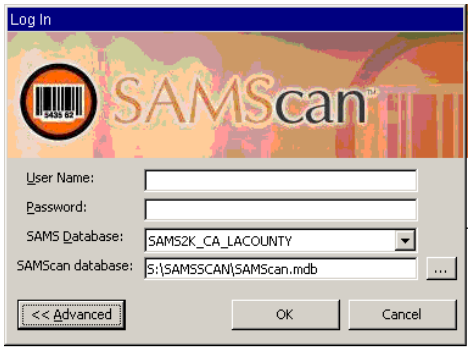
Slide index card down and up to scan the correct consumer meal.

III. Scanning the Roster

A. From the AgingNetwork.com and under the SAMS Production folder, single click on the SAMScan icon.



B. You will see the Log In window.



C. If you do not see the four entry fields select the “Advanced” button.

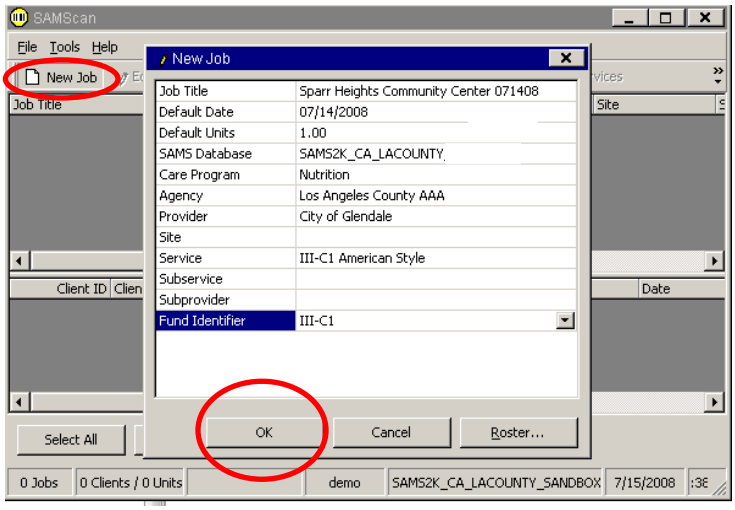
i. The User Name is your assigned SAMS Login.

ii. Password is your selected password.

iii. SAMS Database will be the SAMS production database as indicated in the above sample.

iv. The SAMScan database must be selected the first time a user goes into SAMS and it should remember it from then on. Check it each time to make sure it is “SAMSCAN.mdb”

D. From the SAMScan popup window select the “New Job” button.



E. In this example we will pretend to be the City of Glendale and will be scanning congregate meals from the Sparr Heights Community Center. You will of course select your own agency and site.

F. Enter the Job Title, suggestion use the meal site as the title followed by the date of service delivery. This will make it easy to remember where you are in a business process especially important if you are scanning multiple sites or days or both at one time.

G. Default Date will be the date of delivery of the service (the meal). This date of delivery will apply to all services / meals on the roster.

H. Units = **1.00** meaning one meal = 1.

I. SAMS Database = **“SAMS2K_CA_LACOUNTY”** this is where your production data is stored.

J. Care Program = **Nutrition.**

K. Agency = **Los Angeles County AAA.**

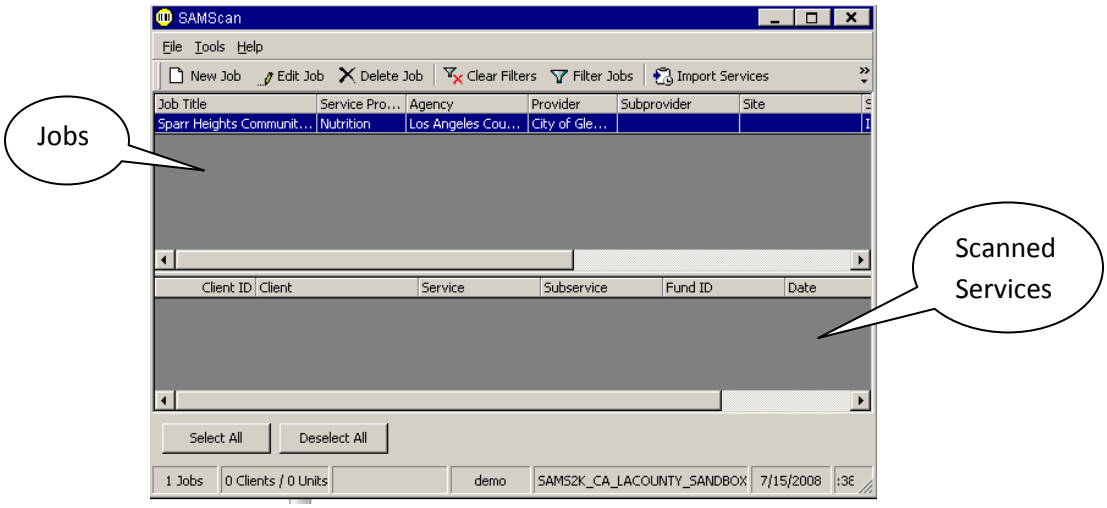
L. Provider = **Use your provider name**

M. Service = **III-C1 American Style** (In this example, this will change according to service delivered)

N. Fund Identifer= **III-C1**

O. Click the OK button to proceed.

P. **Be sure you have the correct Job Title highlighted.** You might be working on two or three job in a row and may need to go back to another job, to correct mistakes. SAMScan will place all service deliveries scanned in whatever job is highlighted.



Q. The SAMScan window is split into two parts, the upper part is where the job is located. The highlighted job will receive the scanned input. The lower part is the scan window for services being scanned.

R. If this is the first time you are scanning you need to reprogram your scanner to work with SAMScan. See Helpsheet #8 for reprogramming the scanner.

S. If while scanning **you are getting no data in the scan window**;

   a. The barcodes could be bad, check to make sure there are clear black and white lines.

      i. To check if your barcode is good; you can open up any word processor or Windows Notepad and scan the barcode ignore the %01 and the following will

be the SAMs Consumer ID (starts with 13). If you can see that then the barcode is probably OK.

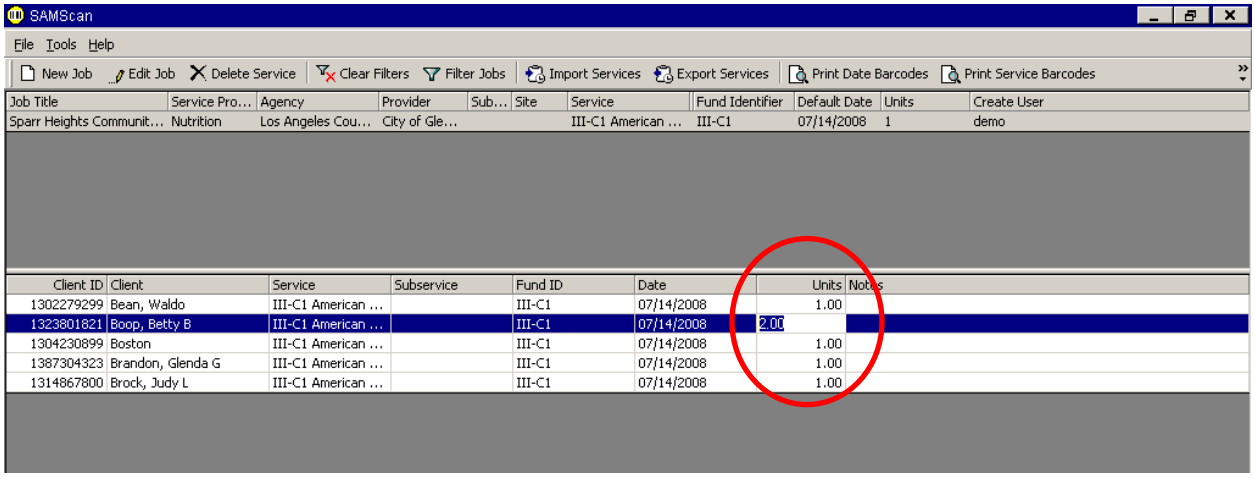
b. The barcode scanner may have become de-programmed, if so, reprogram using Helpsheet #8.

c. You do not have the production data base selected (see item I. above)

T. You can now scan each barcode that has a signature for a meal service delivered. As you scan you will see the scanning data entry being completed.

U. If you make a mistake you can simply use the arrow up and down keys in the scan window to highlight the incorrect entry and then delete it and rescan the correct entry.

V. If you scan a consumer barcode twice it will NOT be two separate entries it will increase the Units in the first scanned service / meal to =2.

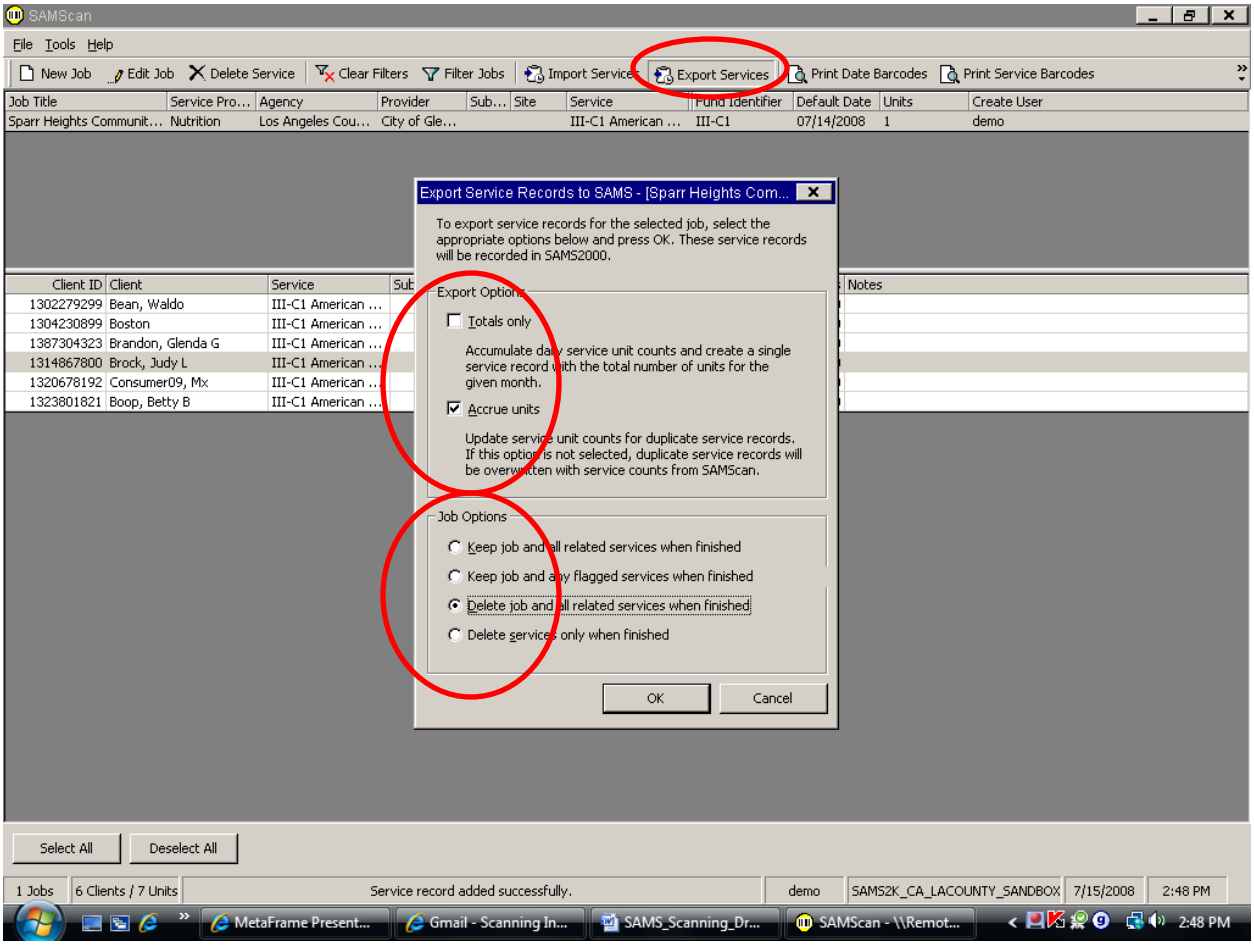


W. You can stop scanning a job and restart later. Simply mark where you had left off on the roster and close SamScan. The data scanned will remain in that “Job” until you “Export” it into SAMS. To resume scanning start SAMScan and highlight the “Job” you were working on and resume scanning the roster from the point you left off. It is recommended that you scan an entire roster at one time, but, sometimes emergencies occur that may prevent that from happening.

IV. Export to SAMS

A. The process to export the SAMScan data to SAMS is an easy process. Select the "Export Services" button.

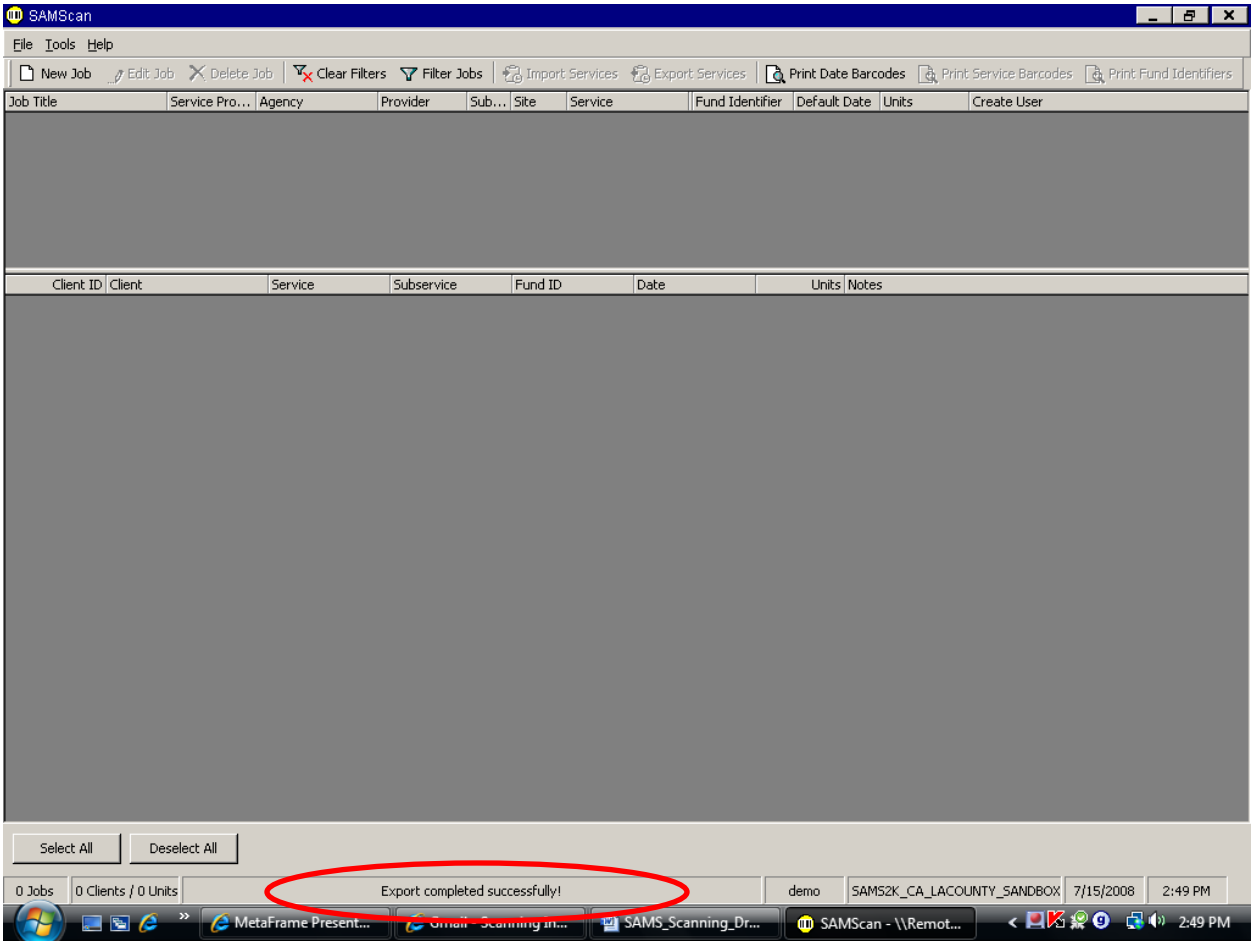
B. You will now see the "Export Service Records to SAMS" – (and job title)



C. Under Export Options make sure the boxes are checked as above. **Uncheck Totals only** if required and **Check Accrue Units.**

D. Under Job Options, select "Delete job and all related services when finished." You will probably be apprehensive about doing this the first time or two but it is okay. If you do not delete the job it simply stays on the screen and is listed as a job. This is one reason it is suggested to include the site name and service delivery date so you can tell what jobs are there. If you do not delete the job it can be done on the screen later, but you run the risk of adding services to a job that has already been exported to SAMS. "Delete job…" is the best option here once you see this really works.

E. Click the OK button.



F. Once the export is complete, which is a really fast process you will see a tiny note on the bottom of the screen “Export completed successfully!”

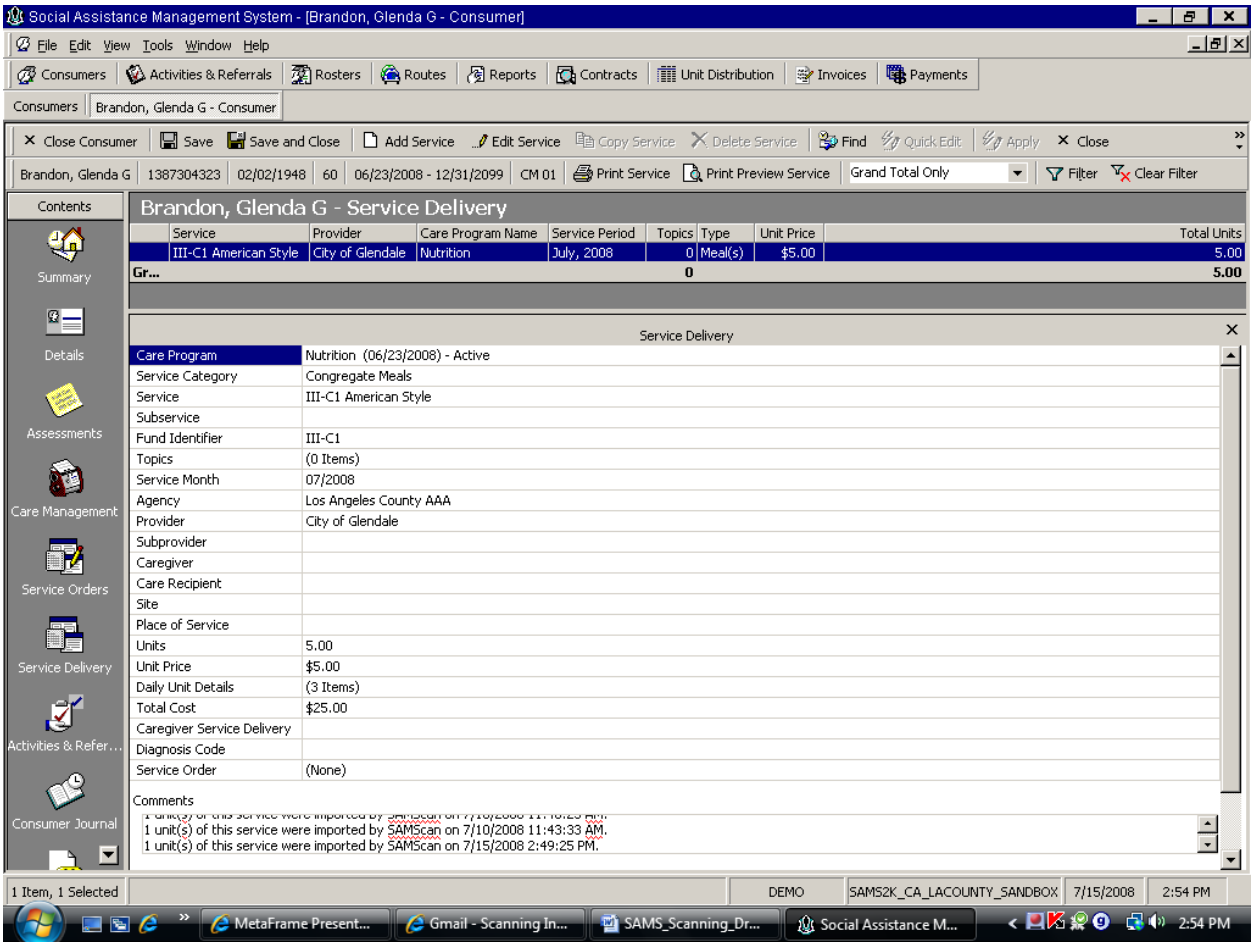
First Time Check SAMS for Services that were scanned in.

IV. Checking SAMS for Scanned Services

A. Select one or more consumers from the SAMScan roster. In our example below it is “Brandon, Glenda”.

B. Enter the SAMS system from the AgingNetwork.com under the SAMS Production folder.

C. Bring up your Consumers list and search for (your selected consumer).



D. Select “Service Delivery”.

E. You will see the detailed services and if you look at the bottom of the screen you will see “Comments”

F. In “Comments” you will see that SAMScan imported 1 unit of service on 07/15/2008 and the time is when the import took place.

G. You have now verified that the SAMScan import worked correctly.