

Instructions - Service Assessment and Evaluation Form

A:

Adding new consumer

If consumer already exists in SAMS/Harmony, choose consumer and move to section B.

For new consumers, at the consumer screen, click “new consumer”.

Enter ALL known basic information.

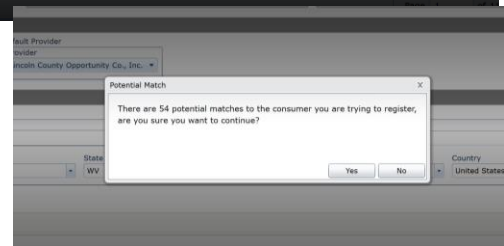
Change the date registered to date of assessment.

If potential matches exist, check that the consumer being added isn't listed.

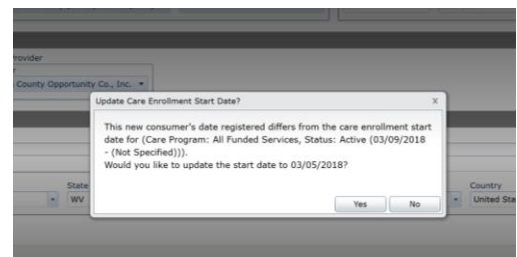
Click OK.

Answer potential match pop-up accordingly.

Always double check potential matches.



If the date registered was changed, answer “Yes” to the next pop up.



Now, your consumer has a profile and consumer number.

The profile that was just created will open at the next screen.

B:

Entering the assessment

Either use the new consumer or select an existing consumer

Click “Assessments”

Click “add new”

From the “Form Filename” drop down,

Select WV SAEF.afm

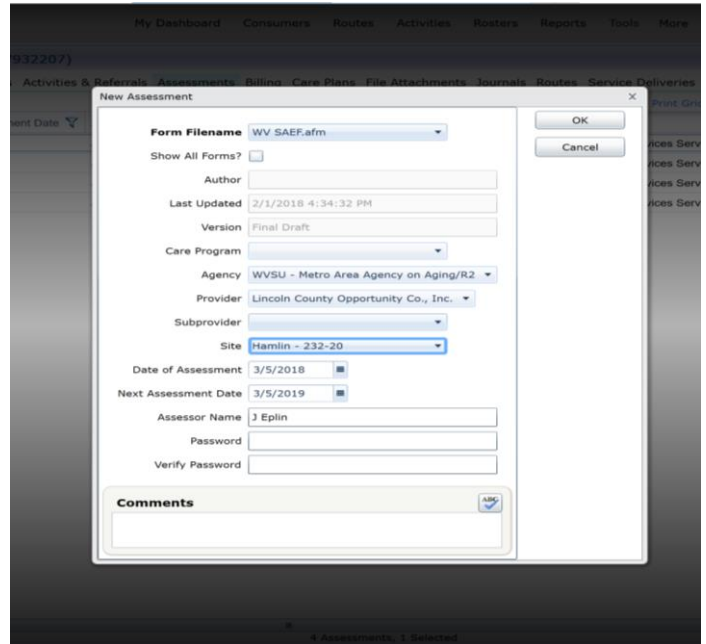
Choose “site” in drop down box

Enter assessment date

Next assessment date will prepopulate

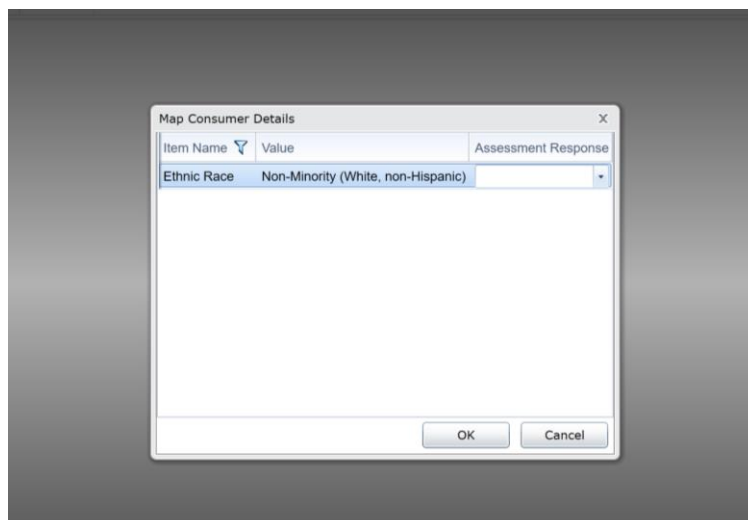
Enter assessor’s name

Click OK

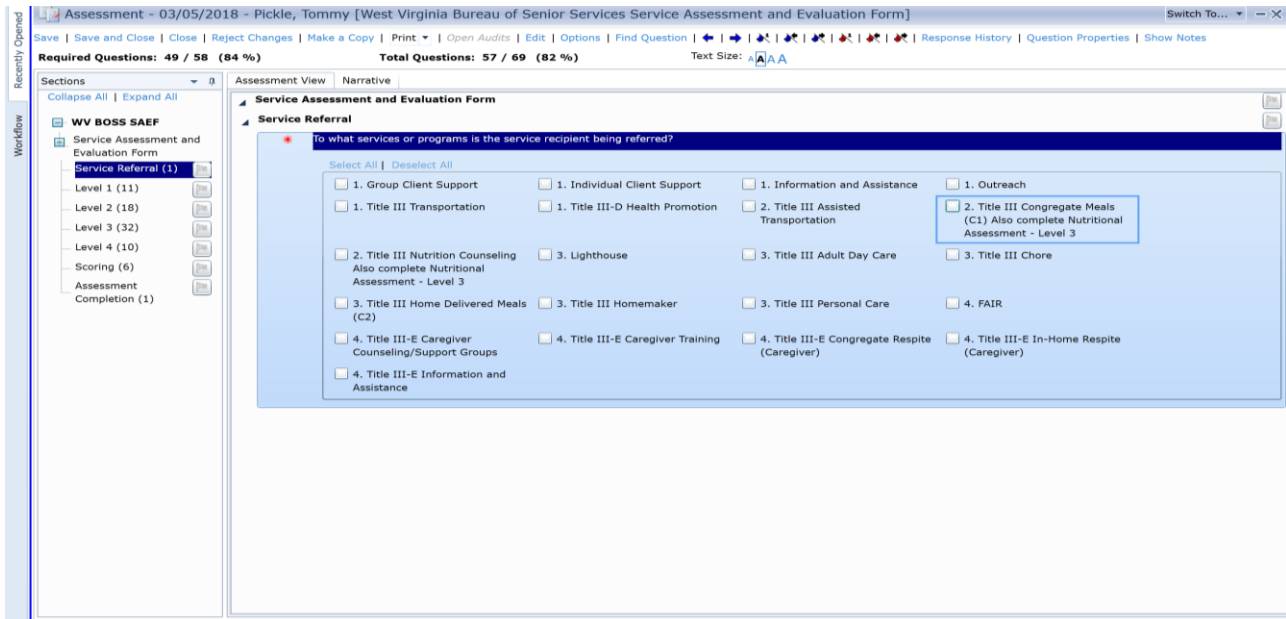


On Map Consumer Details pop-up, choose the correct ethnic race from drop down.

Then click OK.



Choose the services or programs best fitting for recipient/referral.



Level 1

On the left, choose level 1. Level 1 must always be completed

Questions with red asterisk (*) are labeled as required.

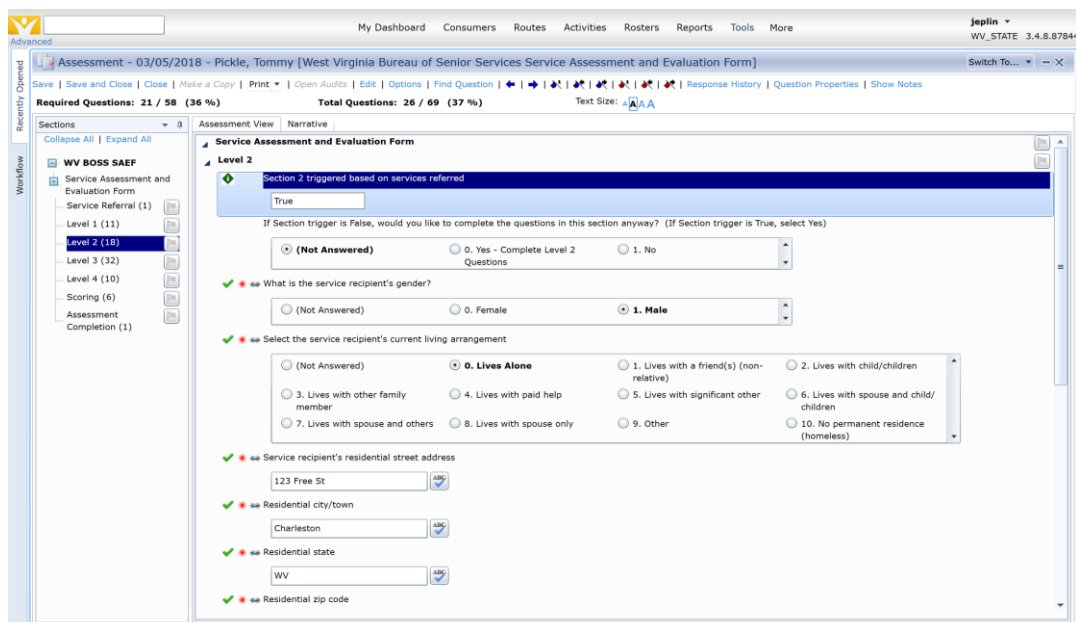
In level 1, an emergency contact is required to complete the level.

Level 1 questions are duplicates of previous BIF questions. Answer accordingly.

Once level 1 is completed, select level 2 from the list on the left.

Based on section trigger, choose whether this section needs to be completed by selecting the appropriate option. True = Yes False = No

If section trigger is false move on to next section.



Level 2

If level 2 needs to be completed, answer questions accordingly. These are also familiar BIF questions.

If level 2 is completed, click on level 3 from the list on the left.

Based on section trigger, choose whether this section needs to be completed by selecting the appropriate option. True = Yes False = No

If the referral is for Congregate Meals/ Nutrition Counseling, the Nutritional Health Assessment must be completed in level 3.

Please note, Level 3 is not required for level 4 Services.

Level 3

If level 3 needs to be completed, answer accordingly.

All nutrition referrals must have a Nutritional Health Assessment in Level 3.

Once level 3 is completed, click on level 4 from the list on the left.

Based on section trigger, choose whether this section needs to be completed by selecting the appropriate option. True = Yes False = No

Level 4

If level 4 needs to be completed, answer accordingly.

Scoring

Once level 4 is completed, you will choose scoring from the list on the left.

This will provide scores for Nutrition Risk, ADL, IADL, Caregiver, and Total scores. These scores will be used for service prioritization based on your county/agency policy.

The screenshot displays the 'Service Assessment and Evaluation Form' (SAEF) interface. The title bar indicates the assessment is for 'Pickle, Tommy' on '03/05/2018'. The interface includes a top menu with options like 'Save', 'Print', and 'Find Question'. Below the menu, it shows 'Required Questions: 50 / 58 (86 %)' and 'Total Questions: 58 / 69 (84 %)'. The main content area is divided into 'Sections' and 'Scoring'. The 'Scoring' section is expanded, showing the following scores: SAEF Score (3), Nutrition Risk Score (11), ADL Score (0), IADL Score (1), Caregiver Score (Not included in Total Score), and Total Score (15). The 'Sections' list on the left includes 'WV BOSS SAEF', 'Service Assessment and Evaluation Form', 'Service Referral (1)', 'Level 1 (11)', 'Level 2 (18)', 'Level 3 (32)', 'Level 4 (18)', 'Scoring (6)', and 'Assessment Completion (1)'. The 'Scoring (6)' section is currently selected.

Annual Update

When annually updating the SAEF. Copy previous SAEF and update as needed.