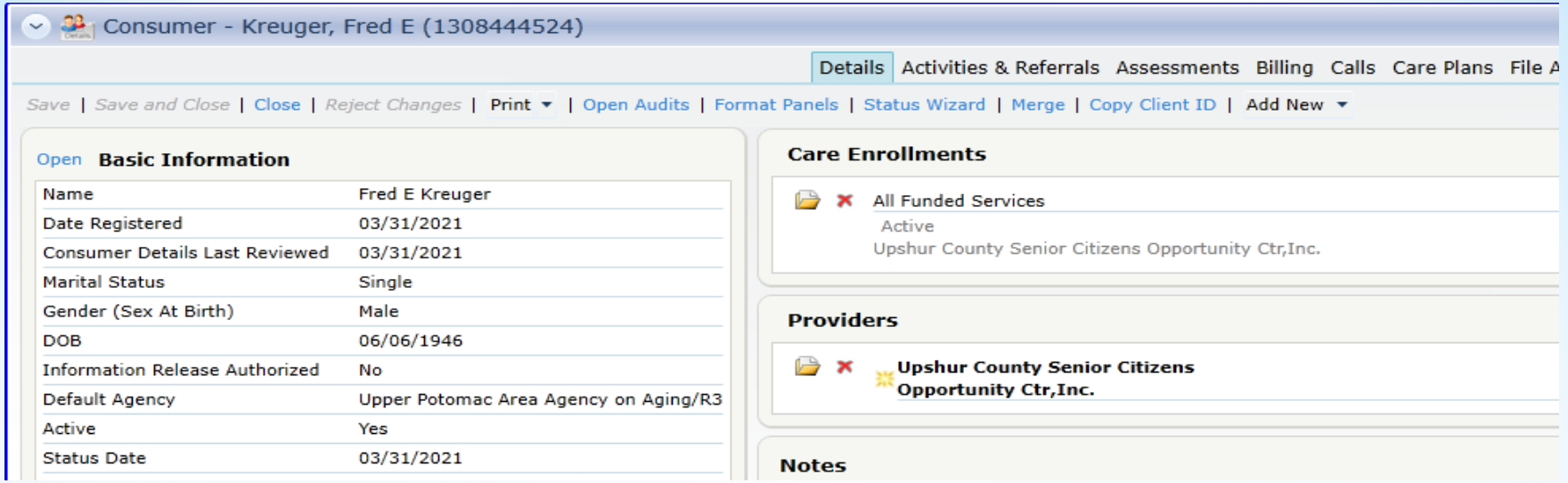
SAEF Data Entry Instructions

WellSky

West Virginia
Bureau of Senior Services

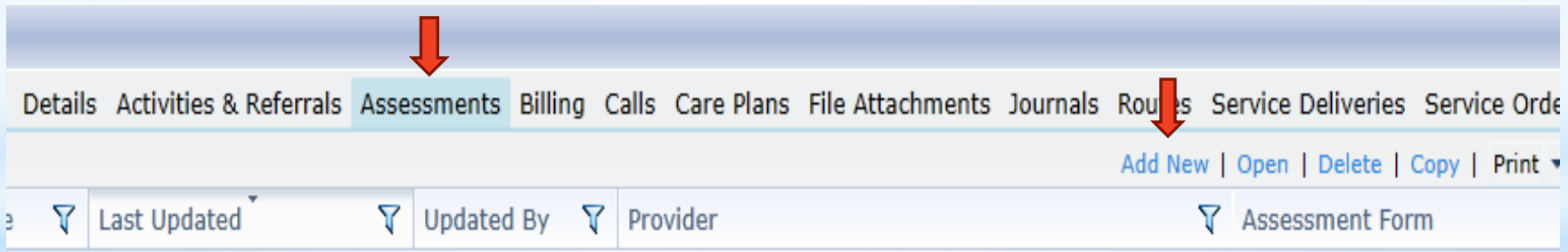


Ensuring Well and Vital Seniors



* Open the Consumer Record

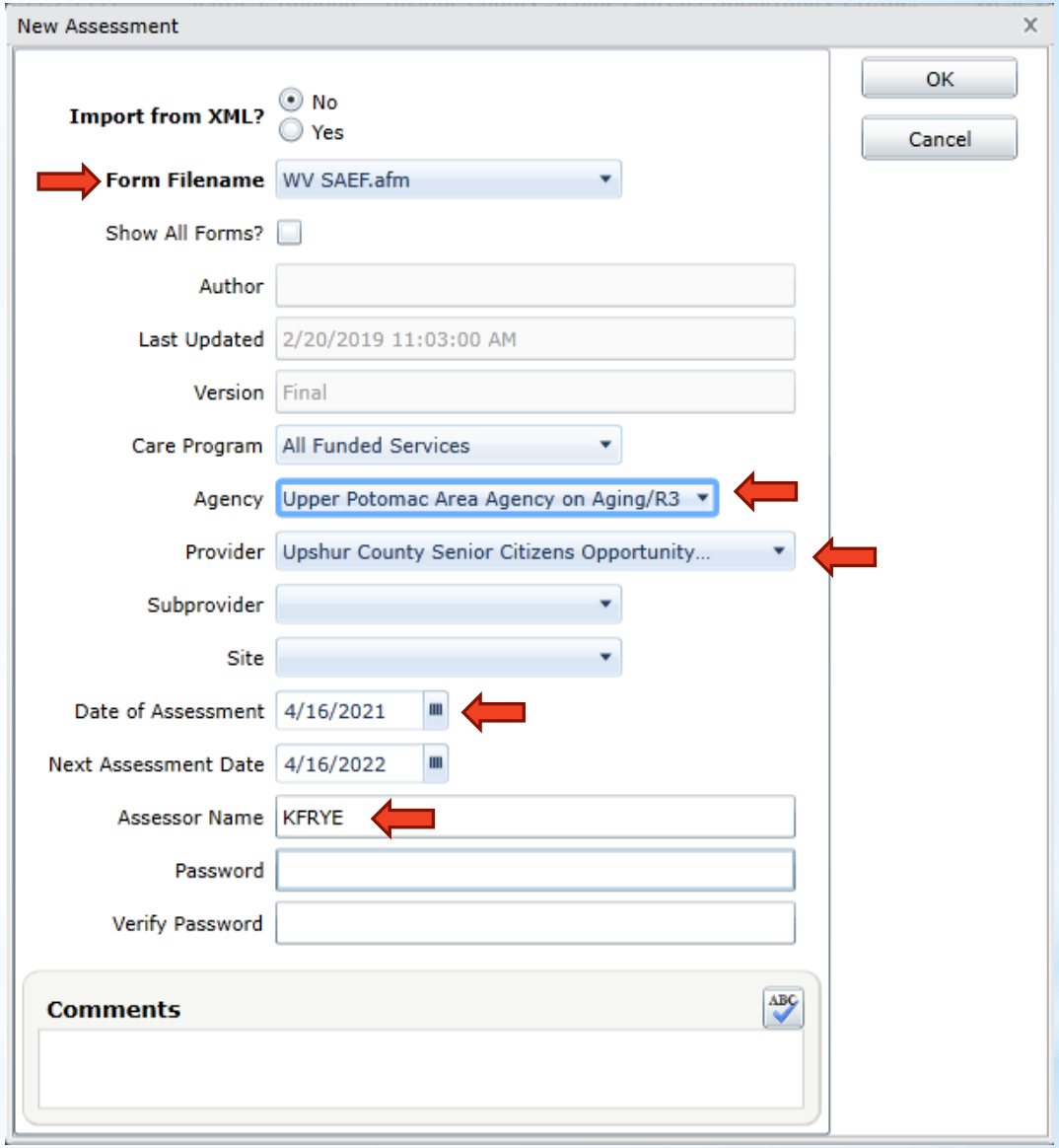
* Select “Assessments” in the top bar, then click “Add New”

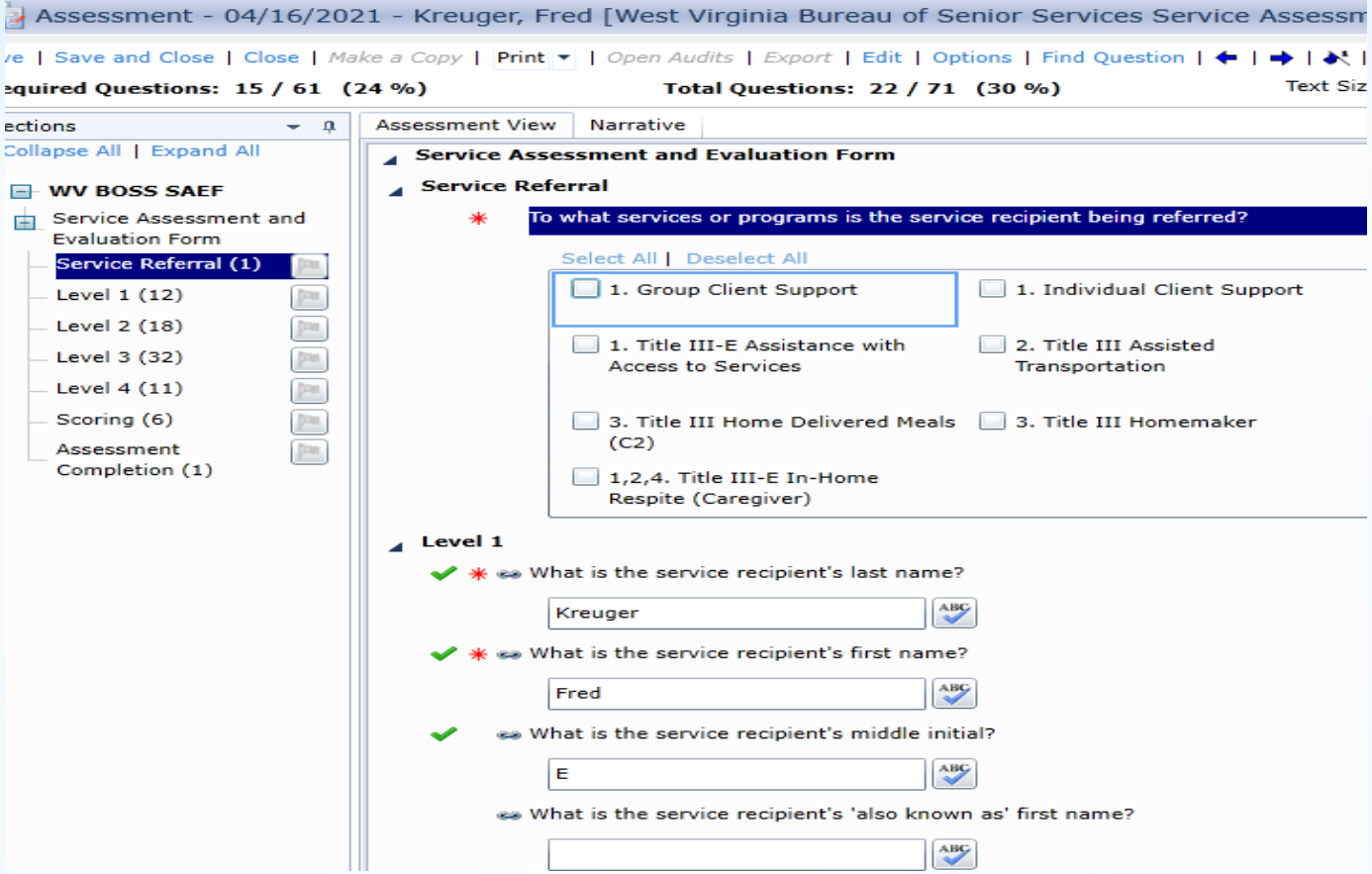


Enter the SAEF (1)

Enter the SAEF (2)

- In the “Form Filename” dropdown
  - Select “**WV SAEF.afm**”
- Make sure that the Agency and Provider auto-populate
  - If not, you must select them
- Enter assessment date
- Enter assessor name
- DO NOT place a password on the assessment





* Complete ALL required fields (* indicates required)
  * Required fields are based on the requested services
* SAEF data entry should be formatted to follow the SAEF form
  * If not, reformat them via the “Format Property List” screen

Enter the SAEF (3)

- **Never copy or edit a previous SAEF.** This leads to missing required data elements and record keeping issues.
- Be sure you have completed the SAEF levels as necessary for the services the consumer will receive.
- ONLY update current SAEF assessments (i.e. address changes, lives alone status, etc.) If a SAEF is outdated, complete and enter a new assessment.

For assistance, contact Keturah (Ket) Frye at kfrye@upwvsc.org

