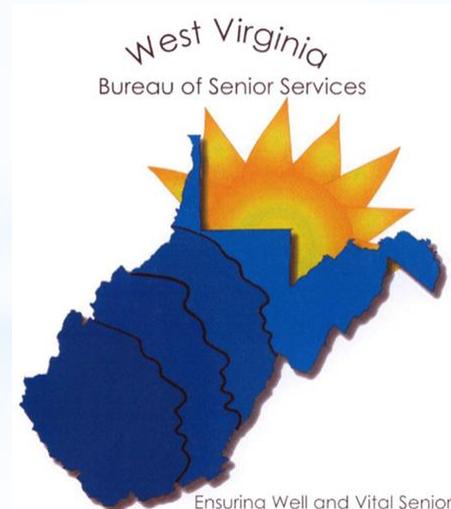


# SAEF Data Entry Instructions



Consumer - Kreuger, Fred E (1308444524)

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | File A

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Status Wizard | Merge | Copy Client ID | Add New

**Open Basic Information**

Name	Fred E Kreuger
Date Registered	03/31/2021
Consumer Details Last Reviewed	03/31/2021
Marital Status	Single
Gender (Sex At Birth)	Male
DOB	06/06/1946
Information Release Authorized	No
Default Agency	Upper Potomac Area Agency on Aging/R3
Active	Yes
Status Date	03/31/2021

**Care Enrollments**

- All Funded Services
  - Active
  - Upshur County Senior Citizens Opportunity Ctr,Inc.

**Providers**

- Upshur County Senior Citizens Opportunity Ctr,Inc.

**Notes**

\* Open the Consumer Record

\* Select "Assessments" in the top bar, then click "Add New"

Details | Activities & Referrals | **Assessments** | Billing | Calls | Care Plans | File Attachments | Journals | Routes | Service Deliveries | Service Order

Add New | Open | Delete | Copy | Print

Last Updated | Updated By | Provider | Assessment Form

# Enter the SAEF (1)

- \* 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

The screenshot shows a 'New Assessment' dialog box with the following fields and values:

- Import from XML?**: Radio buttons for 'No' (selected) and 'Yes'.
- Form Filename**: Dropdown menu showing 'WV SAEF.afm' (indicated by a red arrow).
- Show All Forms?**: Unchecked checkbox.
- Author**: Empty text field.
- Last Updated**: Text field showing '2/20/2019 11:03:00 AM'.
- Version**: Text field showing 'Final'.
- Care Program**: Dropdown menu showing 'All Funded Services'.
- Agency**: Dropdown menu showing 'Upper Potomac Area Agency on Aging/R3' (indicated by a red arrow).
- Provider**: Dropdown menu showing 'Upshur County Senior Citizens Opportunity...' (indicated by a red arrow).
- Subprovider**: Empty dropdown menu.
- Site**: Empty dropdown menu.
- Date of Assessment**: Date picker showing '4/16/2021' (indicated by a red arrow).
- Next Assessment Date**: Date picker showing '4/16/2022'.
- Assessor Name**: Text field showing 'KFRYE' (indicated by a red arrow).
- Password**: Empty text field.
- Verify Password**: Empty text field.
- Comments**: Text area with a blue checkmark icon and 'ABC' text.

Buttons for 'OK' and 'Cancel' are located in the top right corner.

# Enter the SAEF (2)

Assessment - 04/16/2021 - Kreuger, Fred [West Virginia Bureau of Senior Services Service Assessment]

Save | Save and Close | Close | Make a Copy | Print | Open Audits | Export | Edit | Options | Find Question | ← | → | ↻

Required Questions: 15 / 61 (24 %) Total Questions: 22 / 71 (30 %) Text Size

Actions Collapse All | Expand All

WV BOSS SAEF

- Service Assessment and Evaluation Form
  - Service Referral (1)
    - Level 1 (12)
    - Level 2 (18)
    - Level 3 (32)
    - Level 4 (11)
    - Scoring (6)
    - Assessment Completion (1)

Assessment View Narrative

**Service Assessment and Evaluation Form**

**Service Referral**

\* To what services or programs is the service recipient being referred?

Select All | Deselect All

1. Group Client Support  1. Individual Client Support

1. Title III-E Assistance with Access to Services  2. Title III Assisted Transportation

3. Title III Home Delivered Meals (C2)  3. Title III Homemaker

1,2,4. Title III-E In-Home Respite (Caregiver)

**Level 1**

✓ \* What is the service recipient's last name?

✓ \* What is the service recipient's first name?

✓ What is the service recipient's middle initial?

What is the service recipient's 'also known as' first name?

- \* 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](mailto:kfrye@upwvsc.org)

