CHECKLIST FOR ENTERING SAMS INFORMATION

1. Select a facility (if your provider has more than one).
2. Search for your client (best search uses a maximum of first 3 characters of last name and first character of first name).
   a. If client is not found, ADD CLIENT. Enter client information.
   b. If client is found, double click on client. Update client information, if needed.
   c. SAVE.
3. Select a screening tool, if needed.
   a. Fill out screening information.
   b. SAVE.
   c. EXIT/CANCEL.
4. Select ACT, if needed.
   a. Fill out ACT information.
   b. SAVE.
   c. EXIT/CANCEL.
5. Select ADMISSION, if admitting, adding services or discharging client.
6. Enter/update admission data.
   a. If entering admission data for first time and client has insurance, system will ask for more insurance information.
   b. Initial client eligibility will be calculated based on admission data.
7. Select INSURANCE, if insurance information needs to be updated after initial entry.
   a. SAVE.
   b. EXIT/CANCEL.
8. Select ELIGIBILITY to update eligibility information every 30 days.
   a. SAVE.
   b. EXIT/CANCEL.
9. Enter/bypass ASI or Teen-ASI.
   a. If filling out ASI or Teen-ASI, blue questions are required.
   b. SAVE often (suggest prior to moving to next tab).
   c. FINALIZE ASI.
   d. EXIT/CANCEL.
10. Enter/update DIAGNOSIS information.
    a. Enter/update DRUG MATRIX information.
       i. SAVE.
       ii. EXIT/CANCEL.
    b. SCORE/update DSM-IV diagnosis.
    c. Enter/update co-occurring information.
    d. SAVE.
    e. EXIT/CANCEL.
11. Enter/update PLACEMENT information.
    a. If client begins to receive a different level of service from the same provider, select TRANSFER IN SERVICE to change the level of service information.
    b. SAVE.
    c. EXIT/CANCEL.

CHECKLIST FOR ENTERING SAMS INFORMATION

12. Enter/update treatment SERVICES information.
    a. To enter treatment services, select ADD NEW TREATMENT/SERVICE.
        i. Enter needed information.
        ii. SAVE.
        iii. EXIT/CANCEL.
    b. To update treatment services, double click on treatment service.
        i. Update needed information.
        ii. SAVE.
        iii. EXIT/CANCEL.
13. DISCHARGE client, only when all information on client has been entered into system.
    a. Enter discharge information.
    b. SAVE.
    c. Enter discharge DRUG MATRIX information.
        i. SAVE.
        ii. EXIT/CANCEL.
    d. Enter/bypass ASI or Teen-ASI.
        i. If filling out ASI or Teen-ASI, blue questions are required.
        ii. SAVE often (suggest prior to moving to next tab).
        iii. FINALIZE ASI.
        iv. EXIT/CANCEL.
    e. EXIT/CANCEL.

Hints for Entering SAMS Information

- SAVE often – typically before moving to next tab on screen.
- Always check STATUS BAR if it seems that nothing is happening. If there is an error, the message will show here. If the system is processing, a vertical line will be moving back and forth in the lower right part of the status bar.
- To see the entire status bar, click the middle button in the top right corner to maximize the screen.
- Yellow fields are required. You will not be able to move out of these fields until something is typed in.
- Purple boxes to the right of fields and fields with arrows show a list of valid values for that field.
- Fields with specific valid values can typically be filled in by entering the first character of the value. For example, if the valid values are "yes", "no" or "not applicable", hit "n" twice to select "not applicable".
- Can move around screens using TAB button.
- Change screen size to 1024 X 768 for the best resolution.
- Make sure that you have your pop-up blockers **turned off** before starting with SAMS.
-

CHECKLIST FOR ENTERING SAMS INFORMATION

- **Make sure that you have your Internet Options, Security, Trusted Sites set to the following**:
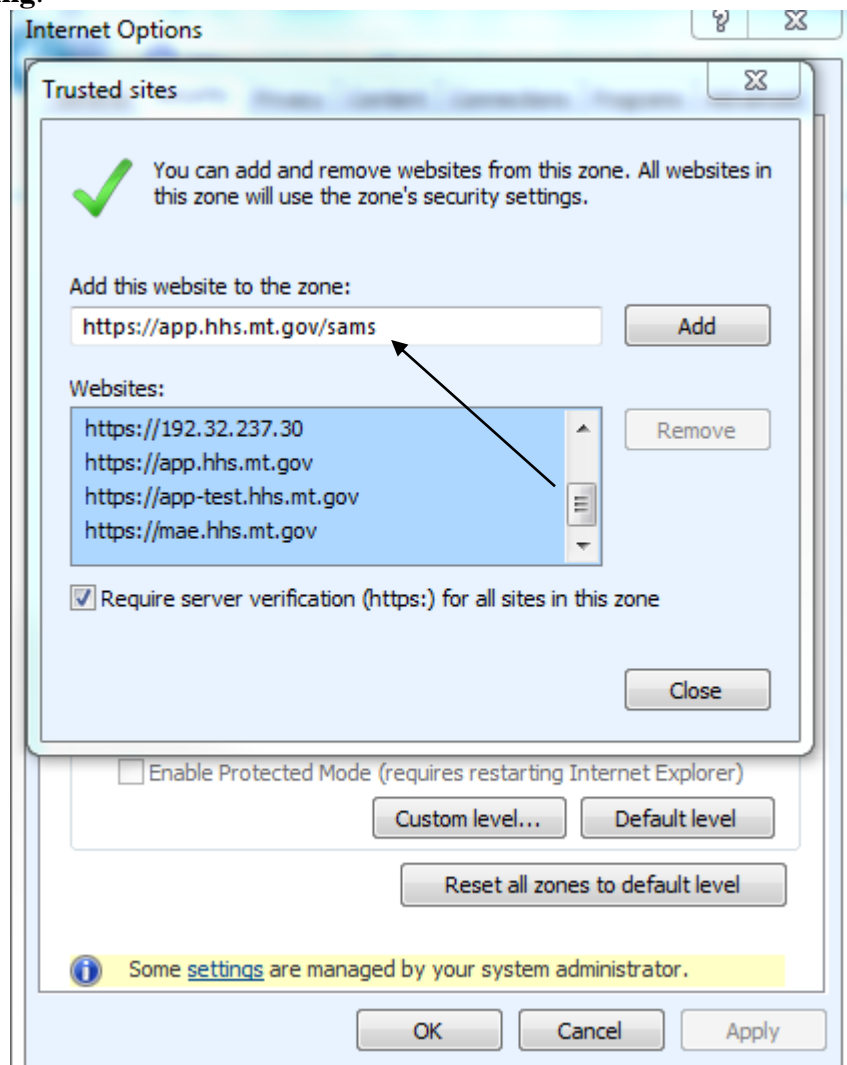
Scenario 1: Internet Explorer (IE7)

A spreadsheet report is called from an Oracle form. The screen flashes, but the spreadsheet never appears to the screen. The report can be found in the report server output queue. Perform the following instructions:

- Open Internet Explorer (IE7)
- At the menu, select Tools
- Choose Internet Options

CHECKLIST FOR ENTERING SAMS INFORMATION

- When the screen below displays, select the Security tab and highlight Trusted Sites
- Click the Sites button

- When the screen below is displayed, uncheck the box at "Require server verification (https:) for all sites in this zone"
- Return cursor to the top field labeled: "Add this Web site to the zone:"
- Type the following sites one at a time, pressing the Add button after each entry

CHECKLIST FOR ENTERING SAMS INFORMATION
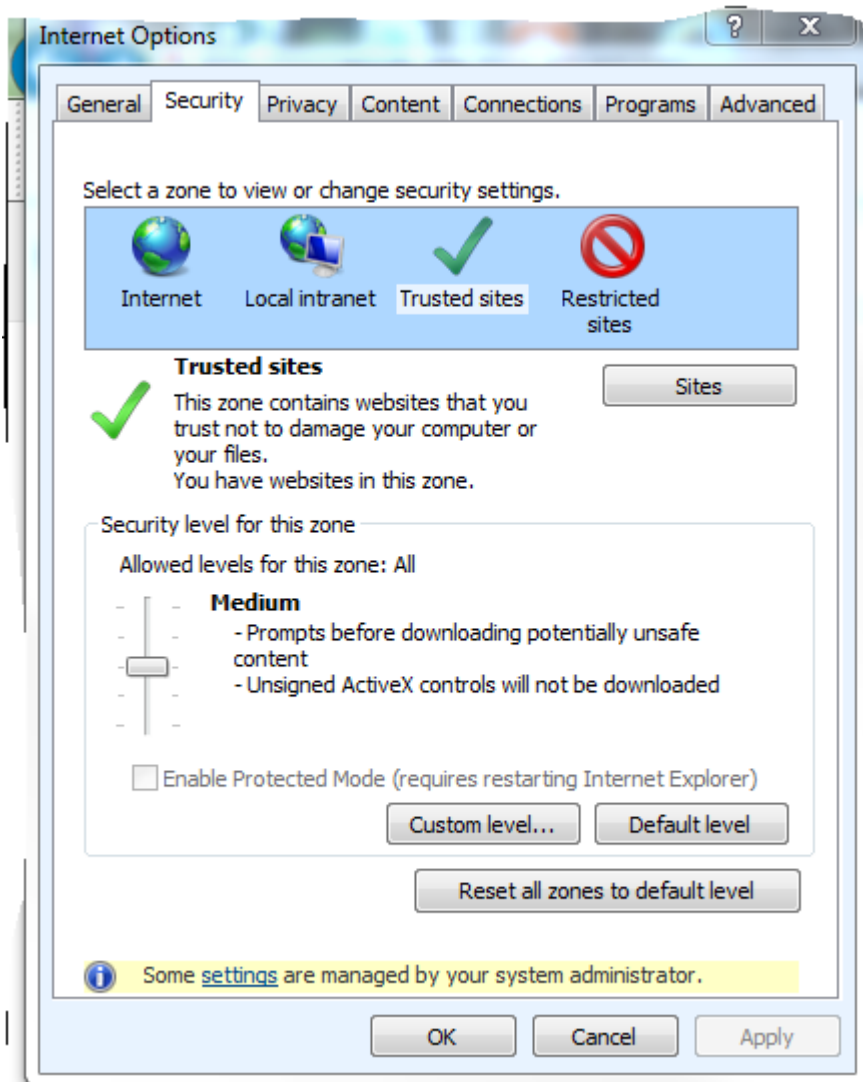
- Unless these addresses are removed from the list manually, a user gets a new machine or Internet Explorer is reinstalled, this change is a one-time fix.
- Close the browser and call up the application again. Run the report. The spreadsheet should display.
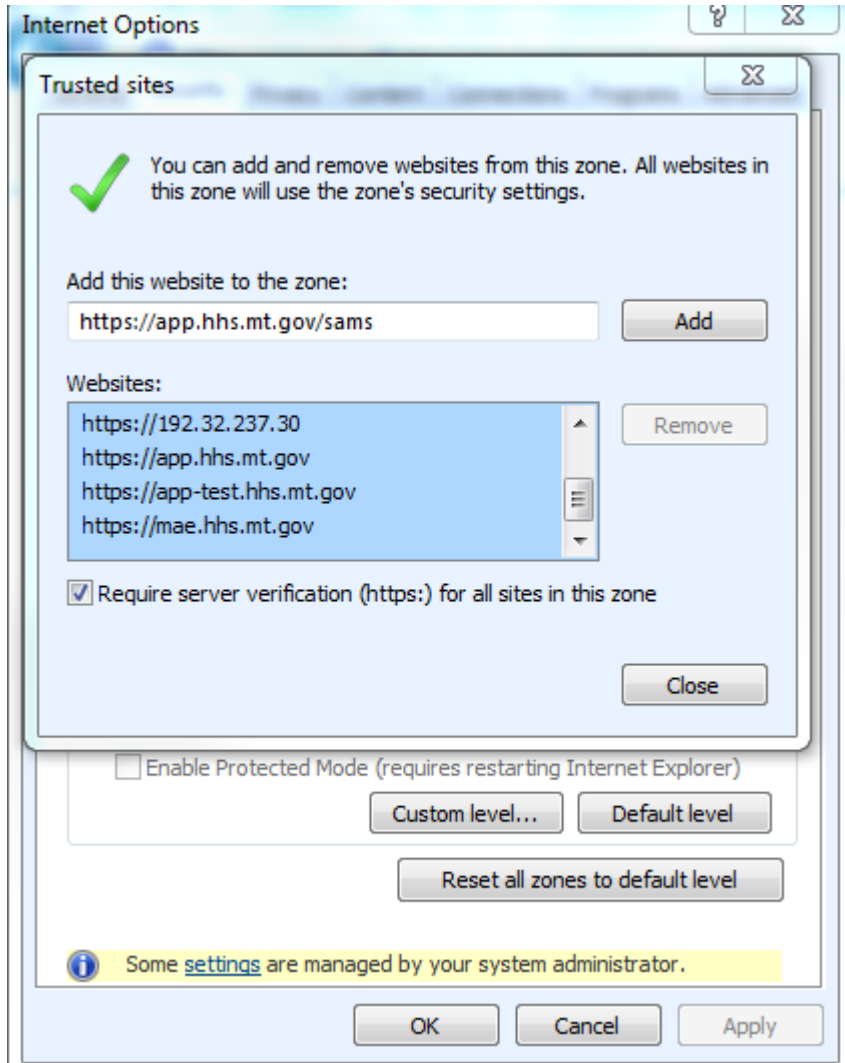
Scenario 2: Internet Explorer (IE7)

A spreadsheet report is called from an Oracle form. The screen flashes, but the spreadsheet never appears to the screen. The report can be found in the report server output queue. Complete the steps to allow a popup for *.hhs.mt.gov and add http://*.hhs.mt.gov and https://*.hhs.mt.gov under Trusted sites. Perform the following instructions:
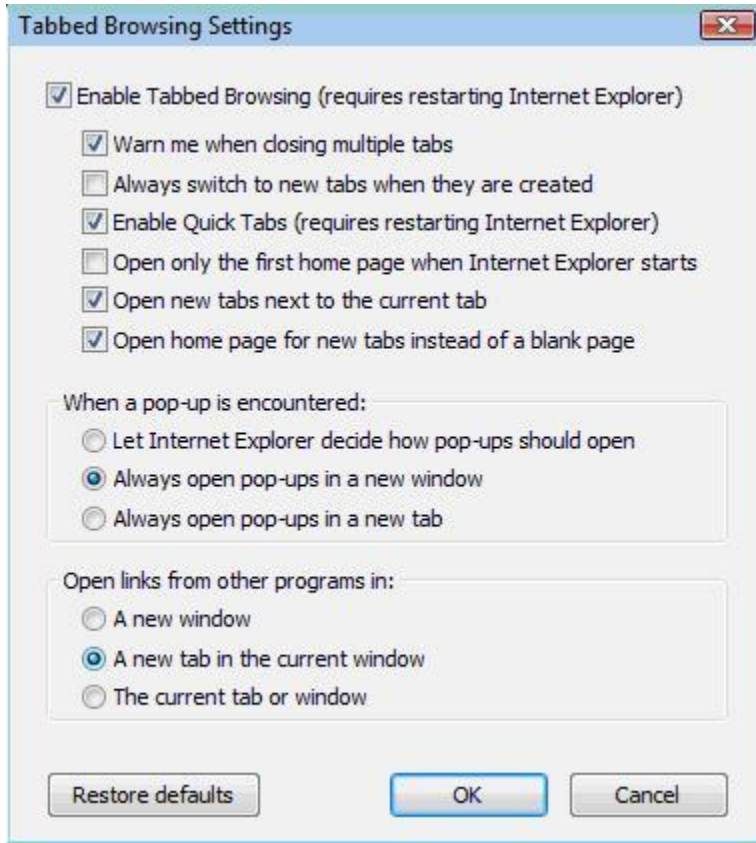
CHECKLIST FOR ENTERING SAMS INFORMATION

- Open Internet Explorer (IE7)
- At the menu, select Tools
- Choose Internet Options
- Select the General tab
- Under the Tabs section, select Tabs Settings
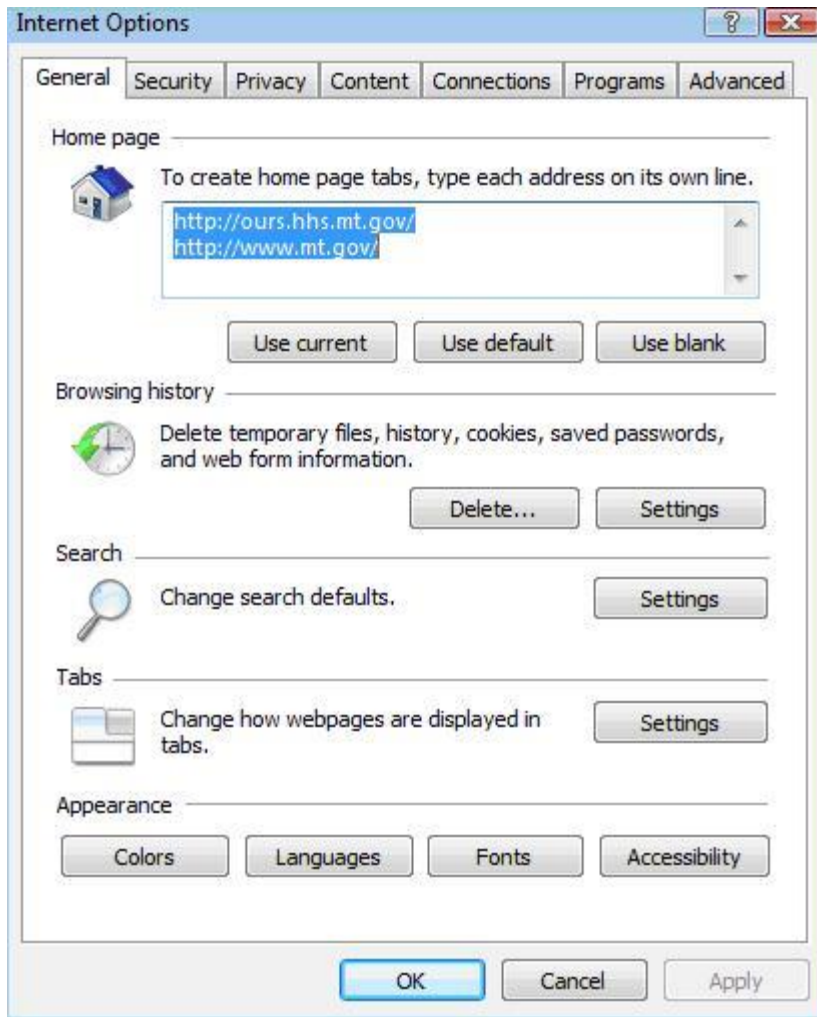
- When the screen below is displayed, change the default selection under "When a pop-up is encountered:" section to "Always open pop-ups in a new window"
- Click OK to apply settings

Depending on how old your computer is, you may see a screen that looks like this, or-(see next screen photo)

CHECKLIST FOR ENTERING SAMS INFORMATION

Tabbed Browsing Settings

☑ Enable Tabbed Browsing (requires restarting Internet Explorer)
  ☑ Warn me when closing multiple tabs
  ☐ Always switch to new tabs when they are created
  ☑ Enable Quick Tabs (requires restarting Internet Explorer)
  ☐ Open only the first home page when Internet Explorer starts
  ☑ Open new tabs next to the current tab
  ☑ Open home page for new tabs instead of a blank page

When a pop-up is encountered:
  ○ Let Internet Explorer decide how pop-ups should open
  ◉ Always open pop-ups in a new window
  ○ Always open pop-ups in a new tab

Open links from other programs in:
  ○ A new window
  ◉ A new tab in the current window
  ○ The current tab or window

[Restore defaults]   [OK]   [Cancel]

CHECKLIST FOR ENTERING SAMS INFORMATION

You may see a screen that looks like this. If your screen is not represented by either photo, please look at the information in each box and use the photo that more closely represents your own screen.
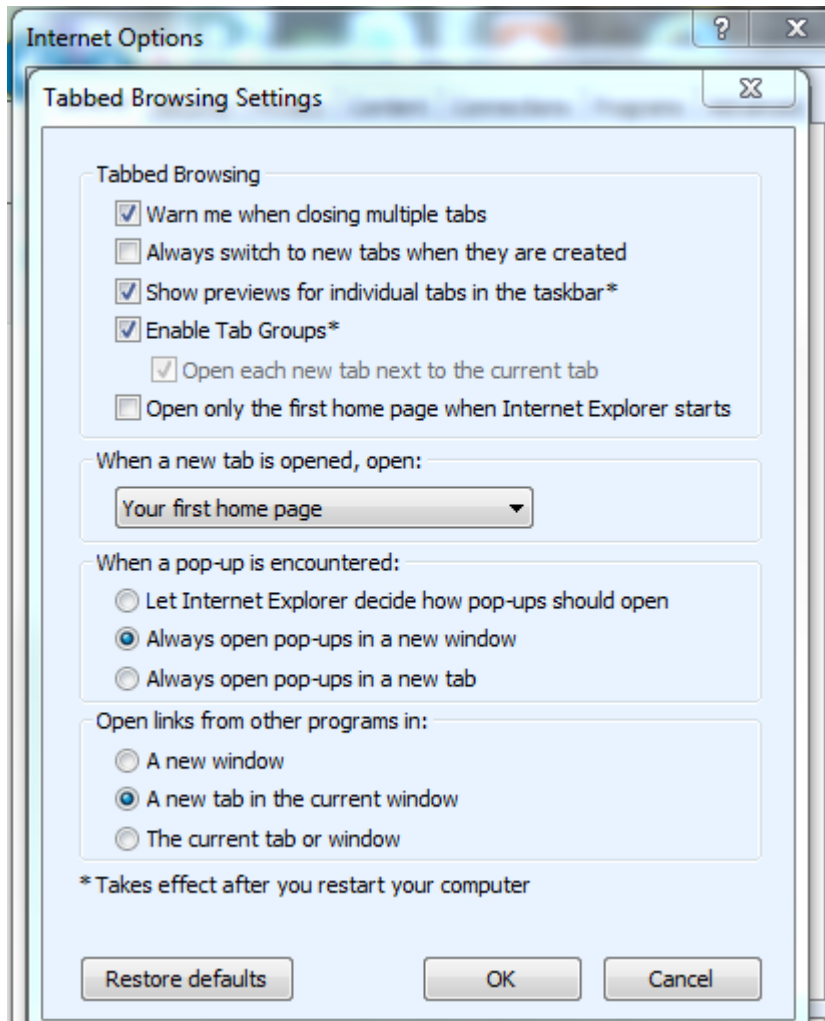

- Next select the Security tab
- Highlight "Trusted Sites"
- Chose Custom Level

CHECKLIST FOR ENTERING SAMS INFORMATION
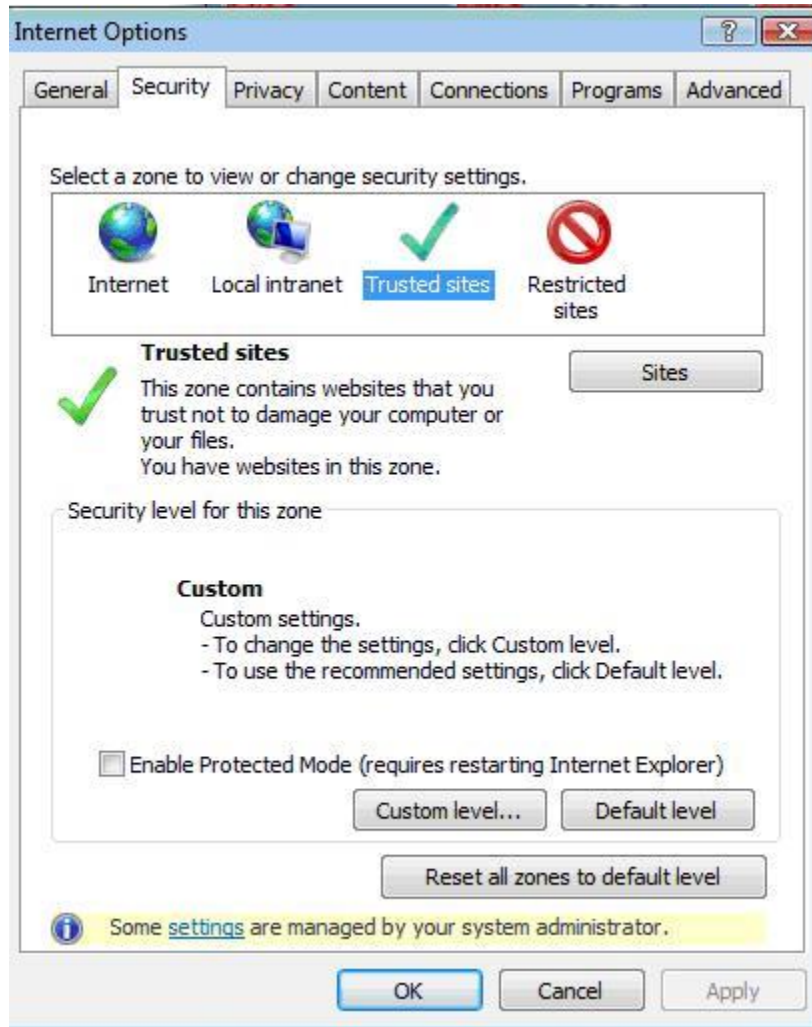
- Scroll down the list to the "Downloads" section
- **Enable** "Automatic prompting for file downloads"
- Click **OK** on Security Settings - Internet Zone
- The browser should ask if the user is sure they want to change the settings
- Click **Yes**
- Click **OK** on Security tab to exit

CHECKLIST FOR ENTERING SAMS INFORMATION
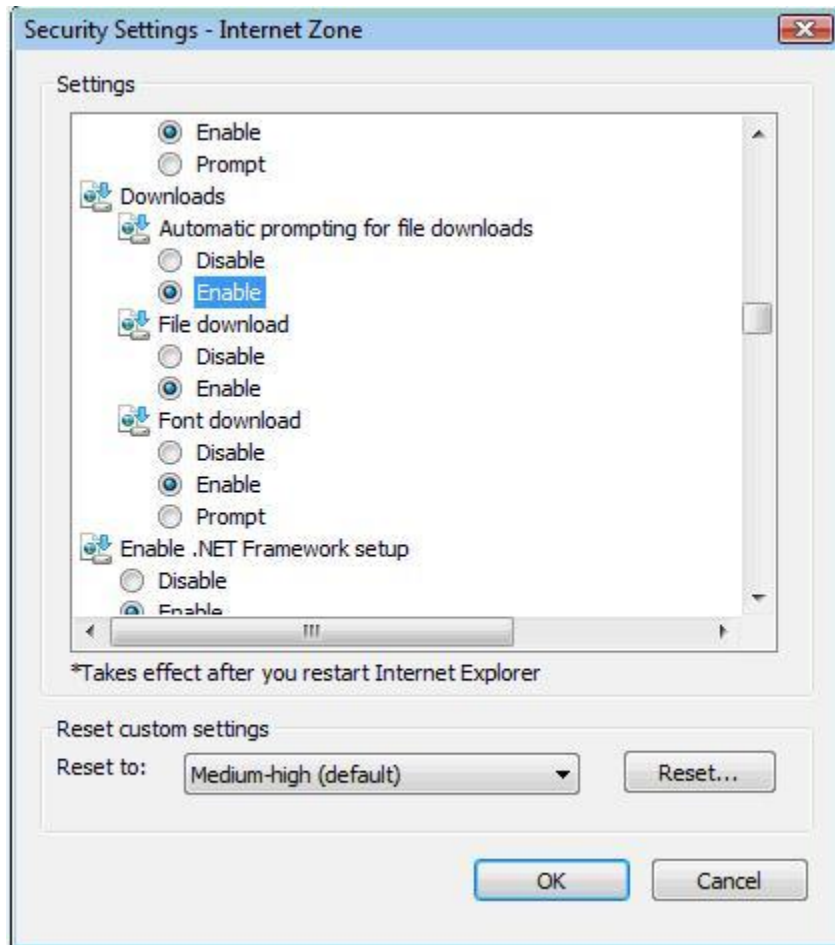
The browser will indicate that the changes will take effect once the browser is closed and restarted (See NOTE below)

- Shut down and restart the browser

NOTE: It has been observed more than once that closing the browser and reopening the browser immediately does not allow the operating system ample time to catch up to the setting change. To avoid frustration, the user should give the operating system a minute or two to run through the user policies before restarting the browser.

SAMS **PRODUCTION** URL:
https://app.hhs.mt.gov/sams

SAMS **TESTING** URL: (Only use if you are asked to access QADB)
https://app-test.hhs.mt.gov/sams