

During June/July 2007, Amy Ramsey and Karl Schlenker conferred with the Nutrition Check Committee to determine how best to proceed regarding a standardized nutrition form and the use of SAMS to track client nutrition data. Karl explained to committee members a few options for tracking nutrition assessment data in SAMS. The two best options we discussed were as follows:

### **Option A : Assessment Forms**

SAMS has built-in functionality which allows a user to assess a client multiple times and thus create a long-term assessment history. Users can custom-design their own assessment forms using additional software (Omnia Designer) which is sold by Synergy Software. However, SAMS currently stores this assessment data completely separate from the client's other information. (Ostensibly Synergy used this design to, e.g., allow a nutrition coordinator to password-protect her assessments and thus prevent other SAMS users from reading her assessment notes.) This data separation effectively prevents a SAMS user from generating a standard SAMS report which will include customized assessment data fields. Synergy sells another software package (Omnia Analyzer) which allows users to more intricately report on these built-in assessments. General consensus among the nutrition committee members was that the use of SAMS assessment forms is not a viable option at this time, because (1) our current data-tracking needs are limited (i.e. only 10 questions on a nutrition checklist), and (2) the financial cost to each aging unit of purchasing two additional software packages (Omnia Designer and Omnia Analyzer) would outweigh the benefit and likely be prohibitive in most cases.

### **Option B : Custom User Fields**

SAMS also allows an administrative user (i.e. Karl Schlenker) to create one or more customized data fields. A standard SAMS user can then choose from these optional fields and apply one or more of them, including values, to client records within SAMS. While considering the use of custom fields for tracking nutrition assessment data in SAMS, a few potential problems were identified. Firstly, this method cannot be used to generate an unlimited number of historical assessments, since each custom field can exist only once on a given client's data record. Secondly, the data-entry interface is not particularly convenient. Thirdly, reporting - at least for now - will be fairly limited. (A client-listing report can be filtered to show, e.g., a list of client names based on their assessment data. However, the report won't actually display that assessment data; it will only show the basic information for each client with matching criteria.) Despite these limitations, the committee deemed Option B to be preferable to Option A (above). The common sentiment was that it is more important to be able to report on a small amount of data than to track an unlimited amount of history (but not have the ability to report on it).

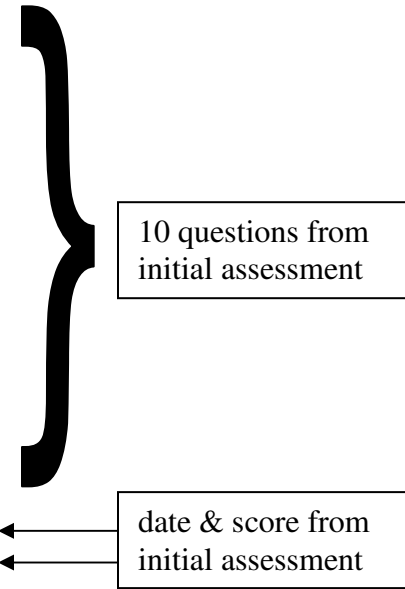
In July 2007, Amy Ramsey e-mailed a preliminary form to committee members. Karl Schlenker used the 10 questions on that form to create 20 custom data fields within SAMS. The first 10 data fields represent the 10 questions as asked on the client's initial nutrition assessment. The second 10 data fields represent the *same 10 questions* as asked on the client's most recent reassessment. By storing data from the initial assessment and the most recent reassessment, a SAMS user can generate reports to compare nutritional statistics or trends. Four additional data fields were then added - 2 for tracking the dates (of the assessment & reassessment), and 2 for tracking the 'total score' values (also for the assessment & reassessment). This makes a total of 24 custom data fields. Finally, a 25<sup>th</sup> data field was added so that users can store some \*limited\* nutrition notes. (This data field is limited to just 250 characters, so these notes must be kept brief. If more detailed notes are required, users can enter them into SAMS via the built-in 'Notes' field or via SAMS 'Journal Entries'.)

During the configuration of these 25 custom data fields in SAMS, it became apparent that several custom fields already exist in SAMS. Most of these other custom data fields were created by different county aging units in years past, when each aging unit separately maintained its own SAMS database (i.e. prior to the statewide merge). It was clear that, for purposes of data entry and visual readability, the 25 new fields should be kept together in the overall list (which includes the pre-existing field names). To accomplish this, a 4-character prefix was assigned to each new field name and description. In order to keep all of the new data fields together in an alphabetical listing, this prefix starts with the letter 'q' (since that letter was not yet in use in the existing list of field names). The second character is either an 'i' (representing the initial assessment) or an 'R' (representing the latest reassessment). The final two digits represent the question number - i.e. 01, 02, 03..... through 10.

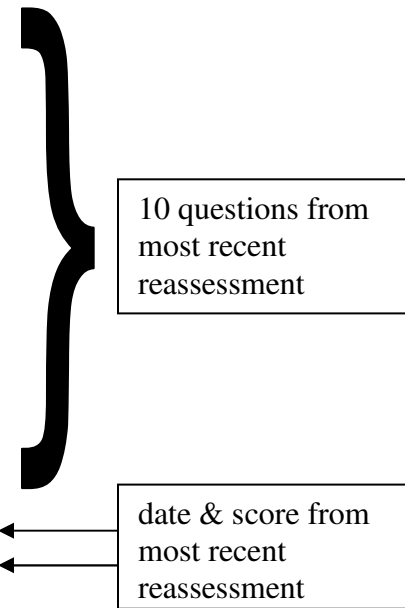
So... for example... the custom data field starting with the prefix "qR07" would be used to record the client's response to the 7<sup>th</sup> question on their most recent reassessment. (Don't worry - the data fields also have descriptions built into them. This explanation only intends to show the logic behind the cryptic characters which precede the data field descriptions.)

All 25 new custom data fields can be seen in the table on the following page. Fields are listed using the alphabetical order in which they will appear within SAMS.

Self-Description / Data Field Description	Score	SAMS Description	SAMS Prompt / Question
I have an illness or condition that made me change the kind and/or amount of food I eat.	2	qi01-IllOrCondition	qi01-Illness/cndtn chngd food?
I eat fewer than 2 meals per day.	3	qi02-FewerThan2meals	qi02-Less than 2 meals/day?
I eat few fruits or vegetables or milk products.	2	qi03-NoFruitVegMilk	qi03-Few fruits/veggies/milk?
I have 3 or more drinks of beer, liquor or wine almost every day.	2	qi04-ThreePlusDrinks	qi04-Three or more drinks/day?
I have tooth or mouth problems that make it hard for me to eat.	2	qi05-ToothMouthProbs	qi05-Tooth/mouth-eating hard?
I don't always have enough money to buy the food I need.	4	qi06-NoMoneyForFood	qi06-Not enough food money?
I eat alone most of the time.	1	qi07-EatsAlone	qi07-Eats alone most of time?
I take 3 or more different prescribed or over-the-counter drugs per day.	1	qi08-ThreePlusDrugs	qi08-Three or more drugs/day?
Without wanting to, I have lost or gained 10 pounds in the last 6 months.	2	qi09-GainedLost10+Lb	qi09-10 lbs +/- in last 6 mos?
I am not always physically able to shop, cook and/or feed myself.	2	qi10-NoShopCookFeed	qi10-Cannot shop/cook/feed?
date of client's initial assessment	n/a	qi91-InitAssessDate	qi91-Initial Assessment Date
total score (0-21) from client's initial assessment	0-21	qi92-InitAssessScore	qi92-Initial Assessment Score

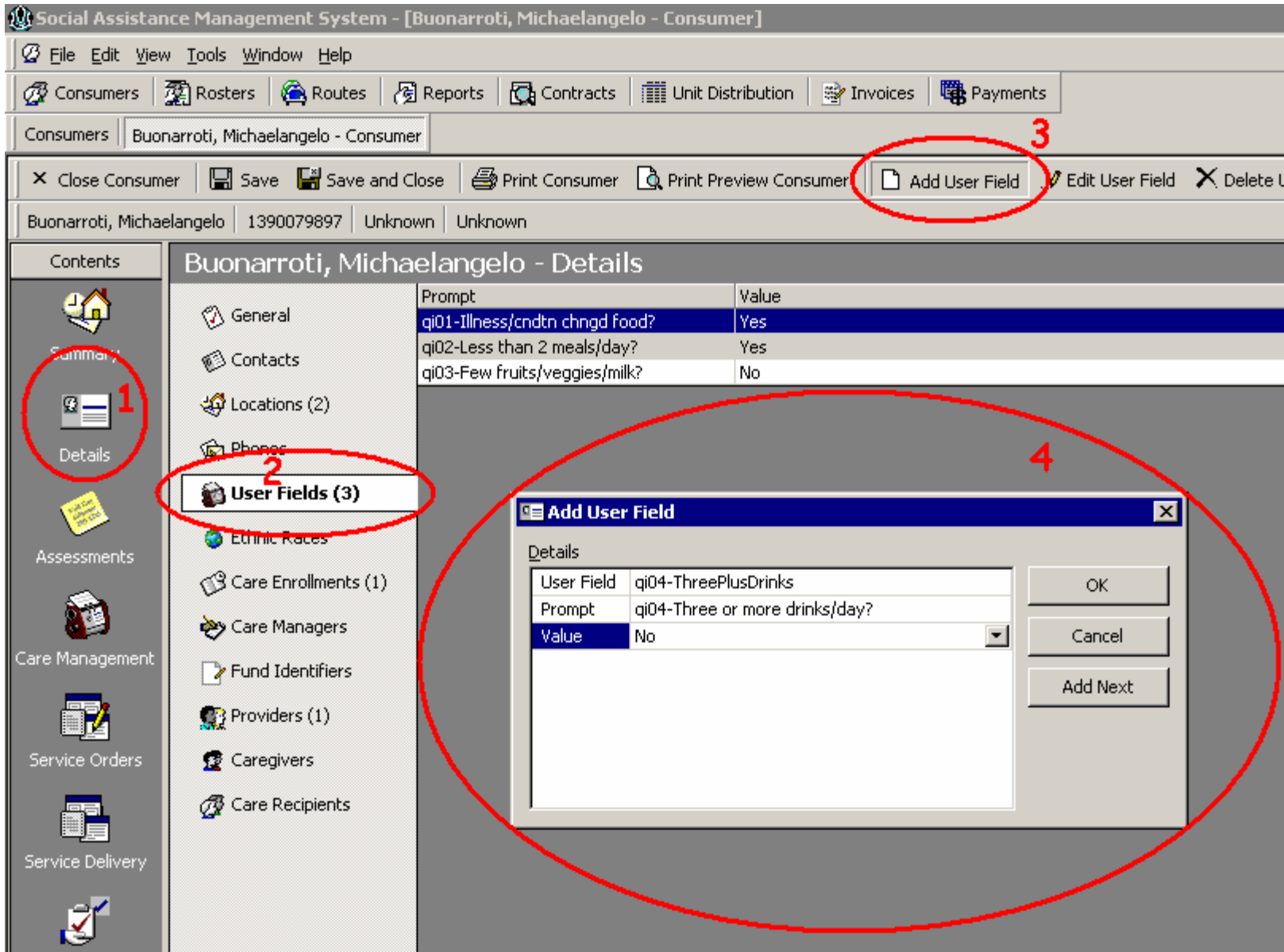


I have an illness or condition that made me change the kind and/or amount of food I eat.	2	qR01-IllOrCondition	qR01-Illness/cndtn chngd food?
I eat fewer than 2 meals per day.	3	qR02-FewerThan2meals	qR02-Less than 2 meals/day?
I eat few fruits or vegetables or milk products.	2	qR03-NoFruitVegMilk	qR03-Few fruits/veggies/milk?
I have 3 or more drinks of beer, liquor or wine almost every day.	2	qR04-ThreePlusDrinks	qR04-Three or more drinks/day?
I have tooth or mouth problems that make it hard for me to eat.	2	qR05-ToothMouthProbs	qR05-Tooth/mouth-eating hard?
I don't always have enough money to buy the food I need.	4	qR06-NoMoneyForFood	qR06-Not enough food money?
I eat alone most of the time.	1	qR07-EatsAlone	qR07-Eats alone most of time?
I take 3 or more different prescribed or over-the-counter drugs per day.	1	qR08-ThreePlusDrugs	qR08-Three or more drugs/day?
Without wanting to, I have lost or gained 10 pounds in the last 6 months.	2	qR09-GainedLost10+Lb	qR09-10 lbs +/- in last 6 mos?
I am not always physically able to shop, cook and/or feed myself.	2	qR10-NoShopCookFeed	qR10-Cannot shop/cook/feed?
date of client's most recent reassessment	n/a	qR91-ReassessDate	qR91-Reassessment Date
total score (0-21) from client's most recent reassessment	0-21	qR92-ReassessScore	qR92-Reassessment Score



notes regarding client's nutrition (for initial assessment & all reassessments)	n/a	qx99-NutritionNotes	qx99-Nutrition Notes
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To enter data for a client's initial assessment, you will need to apply 10 user field values to your client's record in SAMS. Start by opening the client record in question. Then click on (1) the 'Details' icon, (2) the 'User Fields' icon, and (3) the 'Add User Field' button. This will bring up (4) the pop-up window, which you can use for quickly adding your data. The initial assessment will require 12 data fields - i.e. 10 for the questions, 1 for the assessment date, and 1 for the total score (which you must calculate manually). TIP: When creating multiple custom data entries, use the 'Add Next' button to continuously add fields without closing the pop-up window.



The screen print below shows how a client's record might appear after you have created data entries for the initial assessment \*and\* the most recent reassessment. (This screen print also includes the optional data field for Nutrition Notes.)

**Social Assistance Management System - [Buonarroti, Michaelangelo - Consumer]**

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Buonarroti, Michaelangelo - Consumer

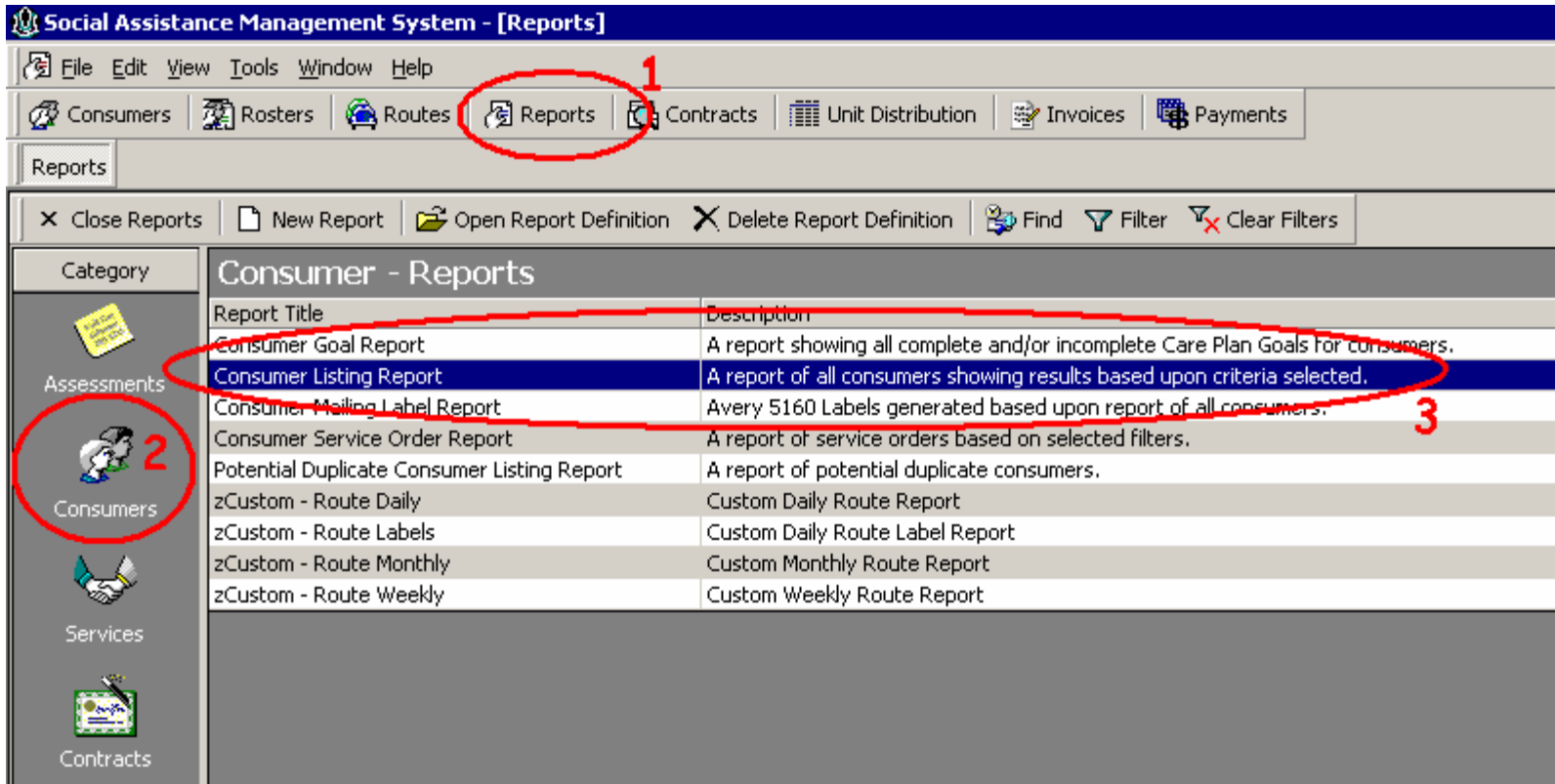
Close Consumer Save Save and Close Print Consumer Print Preview Consumer Add User Field Edit User Field Delete User Field Print User Fields

Buonarroti, Michaelangelo 1390079897 Unknown Unknown

**Buonarroti, Michaelangelo - Details**

	Prompt	Value
General	qi01-Illness/cndtn chngd food?	No
Contacts	qi02-Less than 2 meals/day?	Yes
Locations (2)	qi03-Few fruits/veggies/milk?	Yes
Phones	qi04-Three or more drinks/day?	Yes
<b>User Fields (25)</b>	qi05-Tooth/mouth-eating hard?	No
Ethnic Races	qi06-Not enough food money?	No
Care Enrollments (1)	qi07-Eats alone most of time?	Yes
Care Managers	qi08-Three or more drugs/day?	Yes
Fund Identifiers	qi09-10 lbs +/- in last 6 mos?	No
Providers (1)	qi10-Cannot shop/cook/feed?	No
Caregivers	qi91-Initial Assessment Date	03/05/2007
Care Recipients	qi92-Initial Assessment Score	9
	qR01-Illness/cndtn chngd food?	No
	qR02-Less than 2 meals/day?	No
	qR03-Few fruits/veggies/milk?	No
	qR04-Three or more drinks/day?	Yes
	qR05-Tooth/mouth-eating hard?	No
	qR06-Not enough food money?	No
	qR07-Eats alone most of time?	No
	qR08-Three or more drugs/day?	Yes
	qR09-10 lbs +/- in last 6 mos?	No
	qR10-Cannot shop/cook/feed?	No
	qR91-Reassessment Date	05/15/2007
	qR92-Reassessment Score	3
	qx99-Nutrition Notes	Combined alcohol with 6 prescription drugs and poor nutrition. Counseling and meal access has helped greatly.

More than one template in SAMS can be used for generating a report which is filtered based on custom user fields; the type of report you generate is limited only by your imagination. However, for this demonstration, let's say that we want to show clients who - on or after June 1 - have lowered their nutrition risk total to less than 6 points (when it was previously higher than 6). We'll start by creating a new Consumer Listing Report in SAMS, by (1) clicking the 'Reports' button, and (2) clicking the 'Consumers' icon, and (3) double-clicking the 'Consumer Listing Report' line (to create a new report).



When the report definition comes up, you should (1) type a report description (preferably starting with the county name), and (2) filter the report with our county listed as a Consumer Provider. NOTE #1: Although you technically don't need to filter the report to your county (since it will automatically filter to only show your clients), manually adding this filter may make the report run faster. NOTE #2: Be sure that your provider filter is the 'Consumer Provider' - **\*NOT\*** the 'Default Provider'.

**Social Assistance Management System - [Untitled - SAMS Consumer Listing Report]**

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices

Reports Untitled - SAMS Consumer Listing Report

Close Report Save Report Save and Close Report Save Report As ... Clear All Filters Print

**Untitled - SAMS Consumer Listing Report - Filtered to User Organization**

Report Title	Quasi - Recent Nutrition Improvements
Comments	
Description	
<b>Report</b>	
<b>Report Header</b>	
<b>Care Enrollment</b>	
<b>Care Providers</b>	
Default Agency	(Any)
Primary Care Managers	(Any)
Care Manager	(Any)
Consumer Fund Identifier	(Any)
Fund Effective Date (on)	
Fund Effective Date (through)	
Fund Start Date (on or after)	
Fund Start Date (on or before)	
Fund Identifier End Date (on or after)	
Fund Identifier End Date (on or before)	
Default Provider	(Any)
<b>Consumer Provider</b>	Quasi County Aging Office
Provider Effective Date (on)	
Provider Effective Date (through)	
Provider Start Date (on or after)	
Provider Start Date (on or before)	
Provider End Date (on or after)	
Provider End Date (on or before)	
<b>Consumer Details</b>	
<b>Location</b>	
<b>NAPIS</b>	
<b>Advanced Filters</b>	

After defining a report title and specifying your county as a consumer-level filter, you can add a number of user field filters to limit the resulting list of client names to those which match your selected criteria. In this example, we'll add the following filters:

qi92-Initial Assessment Score  $\geq 6$  (only show clients who initially had a score greater than or equal to 6)

qR91-Reassessment Date On or after 06/01/2007 (we only want to see clients who \*recently\* improved - i.e. some time after June 1<sup>st</sup>).

qR92-Reassessment Score  $< 6$  (only show clients who had a reassessment score less than 6)

See the picture on the following page. With the report definition open, (1) click on the User Fields line to select it, and then (2) click on the dots to bring up the first pop-up window (title 'User Field Filters'). Once the first pop-up window is up, (3) click on the 'ADD' button to create new filtering criteria. A second, smaller window (titled 'Edit User Field') will then pop up. Add your criteria (in our example this is the 3 items listed above), using (4) the 'Add Next' button in between each addition to speed up the process. After you add the last filtering criterion, you can (5) click the 'OK' button to close the smaller pop-up window. Finally, you can (6) click the 'OK' button to close the larger pop-up window and apply the new filtering criteria.

(The picture on the following page demonstrates these 6 steps.)

The screenshot displays the Social Assistance Management System interface. The main window is titled "Untitled - SAMS Consumer Listing Report" and shows a report filtered to "User Organization". The report title is "Quasi - Recent Nutrition Improvements". A "User Field Filters" dialog box is open, showing a table of filters:

Prompt	Value
qI92-Initial Assessment Score	>= 6
qR91-Reassessment Date	On or after 06/01/2007
qR92-Reassessment Score	< 6

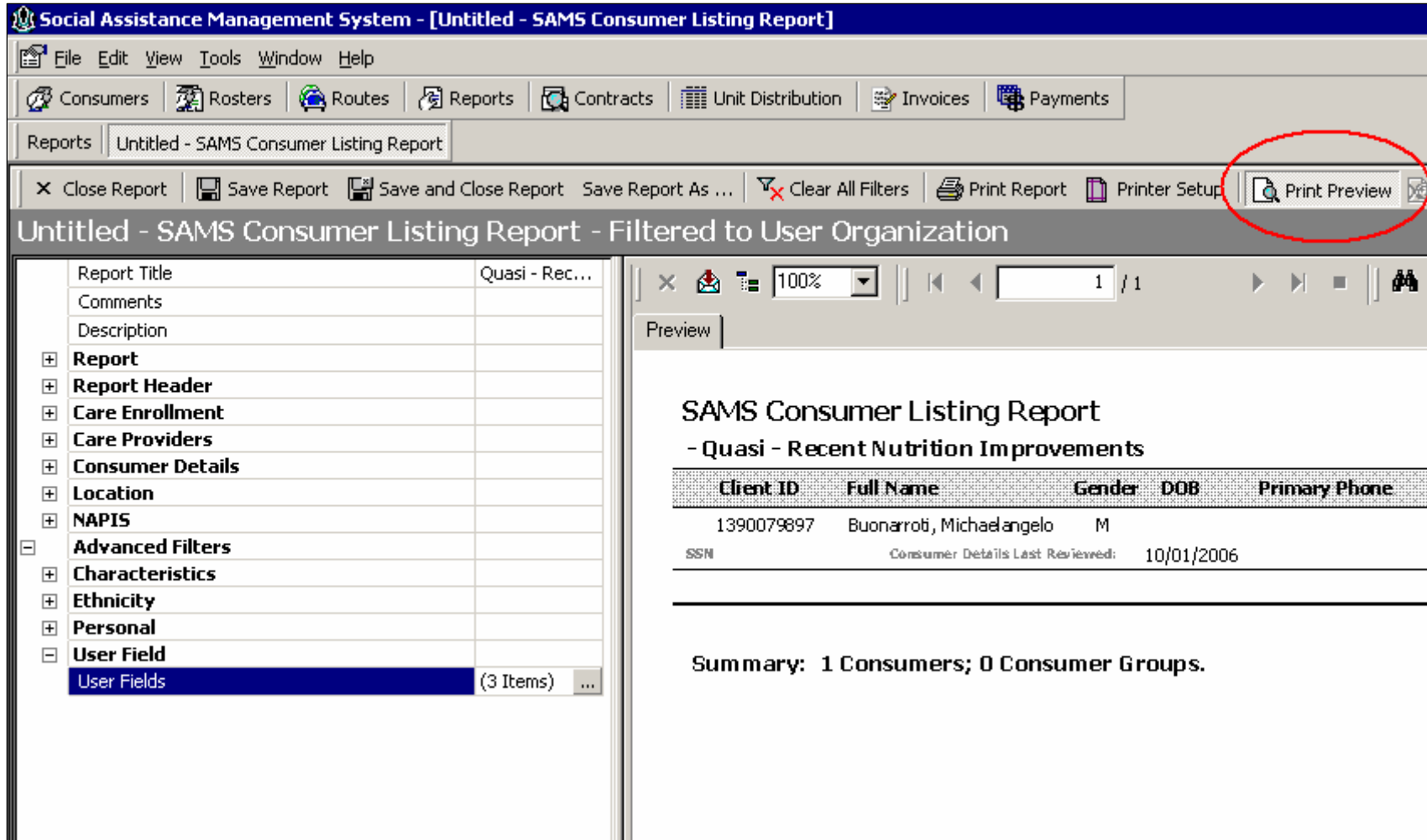
The "Add User Field" dialog box is also open, showing the following details:

User Field	Details
qR92-ReassessScore	
Prompt	qR92-Reassessment Score
Compare	<
Value	6

Red circles and numbers 1 through 6 highlight the following UI elements:

1. "User Fields" in the left sidebar.
2. "..." button in the "Add User Field" dialog.
3. "Add" button in the "User Field Filters" dialog.
4. "Add Next" button in the "Add User Field" dialog.
5. "OK" button in the "Add User Field" dialog.
6. "OK" button in the "User Field Filters" dialog.

After you have selected all of your desired filtering criteria, click the 'Print Preview' button to display the report on screen. If you will regularly use this report, you can save the report definition and open it later for modification.



FINAL NOTE: Even if you use custom data fields to enter a client's total nutrition risk score, you must still specify a Yes/No value in SAMS for the built-in NAPIS data field called 'High Nutritional Risk'. (Fortunately, you will be able to check for inconsistencies in your data - by running a report which show clients whose 'High Risk' setting does not accurately reflect the total score from their most recent reassessment.)