



Program

**Program Units of Service Enhancement Manual
Web Reporting**

Agency User Manual



Effective: April 2004

Program Units of Service

The Program Units of Service module will allow the agency to track units of services that program participants receive. The agency can enter the information client by client or utilize the rapid fill option. Agencies will also have the ability to adjust units of service where the time period for the unit has already been billed. To utilize this module, you must be given user access.

Understanding a Unit of Service

A Units of Service (UOS) definition is comprised of three main components:

1. Quantity – the amount of service rendered
2. Measurement – what the amount is measuring (e.g. hours, days)
3. Dollar Value – the value of 1 UOS

The combination of all three will make up a UOS definition in SAMIS. For example, one UOS could be defined as 2 Hours with a value of \$100 dollars. A UOS will be defined and setup for each activity in a program by the CSC.

Example:

Program: Test Program
Activities

- Teen Council
- Support Group
- After school Care

Activity	Quantity	Measurement	Dollar Value
Teen Council	2	Hours	\$200
Support Group	7	Sessions	\$1,000
After school Care	1	Day	\$50

The actual UOS's will be set up by the CSC and correspond with the activities your program utilizes for clients in SAMIS. UOS's can be set up on both primary and secondary activities.

Clients

This module allows the user to search for a client(s) based on selected criteria and enter in individual units of service for the selected client.

1. From the **SAMIS Main Menu** under Program Functions **Select Program Units of Service**. The following screen will display.

2. From the **Agency - Program** drop down list, **Select** the program. The following page will display.

3. In the **Week of** box type the date for the beginning of the week you wish to view (UOS can only be entered for 7 days at a time in this module).
4. To view only primary or secondary clients, **Select** the appropriate radio button under **Involvement**.
5. **Enter** the field to search on using the first drop down box.
6. **Under Other Criteria, Select** the matching criteria from the second drop down box. (See below for the matching criteria definitions)
7. **Enter** the value to match during the search in the third text box.

Matching Criteria Definitions:

Matching Criteria	Explanation
Exactly Like	An exact match will be looked for on the selected search field. If nothing matches the value entered in the text box then no results will be returned.
Begins With	If the field being searched for begins with the value entered in the text box then the record will be returned.
Ends With	If the field being searched for ends with the value entered in the text box then the record will be returned.
Contains	If the field being searched for contains the value entered in the text box then the record will be returned.

8. From the **Filter By** selections select either **Activity** or **Client**. This determines the view in which the data will be entered.
 - a. If selecting the **Activity** radio button from **Filter By**, from the **Activity** drop down list select the Activity you wish to view then proceed on to Activity View below
 - i. Or,
 - b. If selecting the **Client** radio button from **Filter By**, proceed on to Client View below
9. **Select** the **Search** button to begin the search based on the criteria selected

Understanding the Two Views Used for Data Entry

The Filter By selection determines which views the user will see when entering Program Units of Service. There are two possible views: Activity and Client.

Client View:

When the client view is chosen, a list of all clients in open cases for the specified week and meeting the specified criteria will be displayed. This will provide you the opportunity to select a specific client and enter the Units of Services received for that client based upon the activities entered for them in the CDG module.

The detail data displayed for each client will correspond to the following fields to identify the client. Each program can have up to 4 fields that will display. The CSC will perform setup of these 4 fields. Other fields in SAMIS can be utilized by contracting the SAMIS Systems Administrator.


Available fields:

- Agency Case Code
- Client Name
- Client ID
- CSC Case Code (i.e. CSC ID)
- Date Of Birth
- Identifying Char
- School ID
- SSN

By **Selecting Client** view, the following screen will be displayed:

The first section will display all clients who are active in the program during the week and meet the other search criteria selected.

Entering the UOS for a Client

1. Select the (arrow)  associated with the client you want to enter information on. The screen will then display the selected client along with all the primary and secondary activities associated to the client. *Note: the primary and secondary activities displayed for the client are the same activities that were selected for the client through the CDG module.*
2. Each activity's unit of service definition (i.e. what constitutes 1 unit of service, as setup by the CSC) will be displayed.
3. Enter number of units for the activity for each day of the week. (All values entered must be positive) Once data entry is complete select save and then you will be able to move onto the next client.
4. **Select Save** to save the changes OR **Back** to return to previous page.

Partial Units (i.e., .5) will only be allowed if the Unit of Service has been setup by the to allow partial units.

Activity View:

When the Activity view is chosen, a combo box of all activities in the program will be displayed to the user. When an Activity is selected from the combo box, a list of clients associated to the selected activity (either by Primary or Secondary activity) will be displayed. You will have the ability to enter the units for each day of the week for the selected activity.

By selecting Activity View, the following screen will be displayed:

The screenshot shows a web interface for the 'Activity View'. It includes several filter sections: 'Agency - Program' with a dropdown menu set to 'ABC Agency - A Really Great Program'; 'Week Of' with a date field set to '1/1/2004'; 'Involvement' with radio buttons for 'Primary', 'Secondary', and 'Both', where 'Both' is selected; 'Other Criteria' with a dropdown set to 'Exactly Like' and an empty text field; 'Filter By' with radio buttons for 'Activity' and 'Client', where 'Activity' is selected; and 'Activity' with a dropdown menu showing '--- Select an Activity ---'. At the bottom left, there are 'Save' and 'Back' buttons.

Entering the UOS for an Activity

1. Select the **Activity** from the Activity drop down box.
2. Select **Search**
3. All clients with that activity selected on either primary or secondary activities in CDG will be displayed.

The screenshot shows the 'UOS Definitions' and data entry screen. At the top, the 'Activity' dropdown is set to 'Full Day Summer Camp - GP -9200'. There are 'Search' and 'Rapid Fill UOS Entry' buttons. Below is a table for 'UOS Definitions':

One Unit of Service	Value	Allow Partial Unit	Start Date	End Date	Note
Full Day Summer Camp - GP - 9200 - 1 Day(s)	20.47	Yes	05/26/2003		9200 - One full day of summer camp, minimum of 5 hours per child, per day. Attendance must be timed in and out by child in writing each day. Days of partial attendance of 2 to 5 hours may be billed at a single subunit rate of 50%, or \$10.24.

Below the table is the instruction 'Enter the UOS for each day and client.' and a grid for data entry. The grid has columns for 'Active', 'First Name', 'Last Name', 'Soc Sec Num', 'Agency Case Code', and days of the week (Thu 1/1, Fri 1/2, Sat 1/3, Sun 1/4, Mon 1/5, Tue 1/6, Wed 1/7). There are 'Previous' and 'Next' buttons at the top left of the grid. A red warning message says 'Make sure to save your data before exiting!'.

Active	First Name	Last Name	Soc Sec Num	Agency Case Code	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
Yes A	Adams			Camp H - 2020	1	1	2	3			
Yes A	Adams			Camp H - 2021	2	4	1	3			
Yes A	Anderson			Camp H - 3005	2	4	1	3			

4. **Enter** the number of units for each day of the week for the selected activity.
5. Utilize the **Next** and **Previous** buttons to scroll through the list of clients (50 Clients show per page). Next and previous buttons save automatically.
6. Once data entry is complete Select Save and then you will be able to move onto the next client.

Partial Units (enter as: 1.5) will only be allowed if the Unit of Service has been setup by the to allow partial units.

Inactivating a Client from an Activity

Clients who are no longer receiving services can be inactivated. If a client has been inactivated, the client will not receive any units of service when rapid fill is utilized and the entry boxes for the units will not accept data (this applies to all activities).

Note that any UOS records already captured for the participant will remain in the system. Inactivation is not date sensitive; it simply disallows any further activity for the participant. The user can re-enable a client at any time re-enabling both the manual entry and rapid fill entry of UOS records.

Active clients are indicated by a **Yes** in the active field. **Inactive** clients are indicated with a **No**.

UOS Definitions											
One Unit of Service	Value	Allow Partial Unit	Start Date	End Date	Note						
Full Day Summer Camp - GP - 9200 - 1 Day(s)	30.47	Yes	05/26/2003		9200 - One full day of summer camp, minimum of 5 hours per child, per day. Attendance must be timed in and out by child in writing each day. Days of partial attendance of 2 to 5 hours may be billed at a single subunit rate of 50%, or \$10.24.						
Enter the UOS for each day and client.											
Previous		Next		Make sure to save your data before exiting!							
Active	First Name	Last Name	Soc Sec Num	Agency Case Code	Thu 1/1	Fri 1/2	Sat 1/3	Sun 1/4	Mon 1/5	Tue 1/6	Wed 1/7
<input type="checkbox"/>	No	A	Adams		Camp H - 2020	1	1	2	3		
<input checked="" type="checkbox"/>	Yes	A	Adams		Camp H - 2021	2	4	1	3		
<input checked="" type="checkbox"/>	Yes	A	Anderson		Camp H - 3005	2	4	1	3		
<input checked="" type="checkbox"/>	Yes	A	Attzs		Camp H - 2016						
<input checked="" type="checkbox"/>	Yes	A	Barnhart		Camp H - 3006						

Select the **Edit Icon** next under the **Active** column to toggle between the client being active or not.

Program Units of Service Rapid Fill

The Program Units of Service Rapid Fill allows an agency to enter the same units for multiple clients in an activity for a specified date at one time. Criteria can also be made to limit which clients receive the Unit of Service. Once this is done, agencies can back to the client Program Units of Service screen and modify an exceptions. This should greatly reduce the amount of time entering in a unit that applies to multiple clients.

1. From the Samis Main Menu, Select Units of Service Rapid Fill.
2. **Select** the agency/program from the **Agency-Program** drop down list. The following screen will display

Agency - Program:

Date:

Involvement: Primary Secondary Both

Other Criteria: Exactly Like

Activity:

3. Criteria can than be utilized to limit which clients the rapid fill applies to. Only those clients who meet the criteria will have the rapid fill units attached.
4. In the **Date** box **Enter** (or utilize the calendar to select) the date in which rapid fill UOS will be entered.
5. To rapid fill only primary or secondary clients, **Select** the appropriate radio button under **Involvement**
6. To limit the rapid fill by Other Criteria:
 - a. **Enter** the field to search on using the first drop down box.
 - b. **Under Other Criteria, Select** the matching criteria from the second drop down box.
 - c. **Enter** the value to match during the search in the third text box.
7. **Select Search**, the following page will display with the PUOS description associated with the activity.

Agency - Program:

Date:

Involvement: Primary Secondary Both

Other Criteria: Exactly Like

Activity:

Active Clients: 269 [Regular UOS Entry](#)

One Unit of Service	Value	Allow Partial Unit	Start Date	End Date	Note
Full Day Summer Camp - GP -9200 - 1 Day(s)	20.47	Yes	05/26/2003		9200 - One full day of summer camp, minimum of 5 hours per child, per day. Attendance must be timed in and out by child in writing each day. Days of partial attendance of 2 to 5 hours may be billed at a single subunit rate of 50%, or \$10.24.

Number of Units to Apply to Each Client:

8. **Enter** in the number of units to apply to each client.
9. Select Save. Only the clients who are active, match the criteria used to search and who are active will have this unit applied for the day selected.

Your data was saved successfully!

Agency - Program:

Date:

Involvement: Primary Secondary Both

Other Criteria: Exactly Like

Activity:

Search Active Clients: 269 UOS Dollars: \$27,532.15 [Regular UOS Entry](#)

One Unit of Service	Value	Allow Partial Unit	Start Date	End Date	Note
Full Day Summer Camp - GP -9200 - 1 Day(s)	20.47	Yes	05/26/2003		9200 - One full day of summer camp, minimum of 5 hours per child, per day. Attendance must be timed in and out by child in writing each day. Days of partial attendance of 2 to 5 hours may be billed at a single subunit rate of 50%, or \$10.24.

Number of Units to Apply to Each Client:

10. The number of clients affected and the UOS dollars will display.
11. Utilize the **Regular UOS Entry** hyperlink to switch to the regular units of service entry screen to modify clients who need to be modified.

Program Units of Service Reports Overview

Two reports are available to allow the user to track Units of Service (UOS) Program Units of Service Client and Program Units of Service Activity. Both reports are accessed through the Consolidated Reporting Module. Each report can be run at two levels or selection criteria:

Reporting Level – the user selects to run the report by program, agency, or CSC.
Reporting Date Range – the user selects to run the report by any date range.

Accessing Program Units of Service Report

1. From the **SAMIS Main Menu** select **Consolidated Reports**.
2. Select **CDG**
3. Select **[The Report]**
4. Select the **Report Level**
5. Select the **Agency**
6. Select the **Program**.
7. Select **date From and Date TO**.
8. Select **Create Report**.

The screenshot shows the SAMIS Consolidated Reporting interface. On the left is a navigation menu with options: Budget, Reimbursements, Adjustments, CDG (selected), Active Cases, Cases Opened and Closed, Client Level Detail, Performance, Program Units Of Service Activity (selected), Attendance, and Measurable Objectives. The main content area is titled "Program Units Of Service Activity Report" and includes the following fields:

- Select Report Level:** Radio buttons for "Children's Services Council of Broward County" (selected), "Agency", and "Program".
- Agency:** A dropdown menu with "After School Programs" selected.
- Program:** A dropdown menu with "After School Programs - Camp Explorer - Summer Challenge 2003" selected.
- Date From:** A date input field with a calendar icon.
- Date To:** A date input field with a calendar icon.
- Create Report:** A button to generate the report.

Below the form, a summary text reads: "A summary report that displays the total Units of Service and the total value for each activity within a program."

Program Units of Service Client Report

The report will sum all of the units of service entered in for all activities for a client in the specified date range.

Sample Program Units of Service Report

Children's Services Council of Broward County Program Unit of Service Client Report										
Program: ██████████ - Family Strengthening RFP										
From 1/1/04 to 1/31/04										
Family Development Program - Family Strengthening RFP										
First Name	Last Name	Soc Sec Num	Agency Case Code	UOS Value	Original		Adjusted		Net	
					# of Units	Value	# of Units	Value	# of Units	Value
			Family Therapy Intervention - 9070	\$53.14	8.50	\$451.69	0.00	\$0.00	8.50	\$451.69
N	Dez	██████████	██████████	\$53.14	18.50	\$683.09	0.00	\$0.00	18.50	\$683.09
C	Coma	██████████	██████████	\$53.14	15.50	\$823.67	0.00	\$0.00	15.50	\$823.67

Program Unit of Service Activity Report

This report will sum all units of service entered for clients by activity. The report will display each activity along with the total number of units entered in for the activity and the total value of those units.

The Total Value column is calculated using the dollar value of the unit at the time it was entered. Since it is possible to have multiple UOS definitions, it would be incorrect to assume that all units had the same dollar value. Any adjusted amounts will display with the number of units and total value and the net will also display.

Sample Program Unit of Service Activity Report

Children's Services Council of Broward County Program Unit of Service Activity Report							
Program: ██████████		Family Strengthening RFP					
From 1/1/04 to 1/31/04							
██████████ - Family Strengthening RFP							
Activity	UOS Value	Original		Adjusted		Net	
		#ofUnits	Total Value	#ofUnits	Total Value	#ofUnits	Total Value
Case Management - Family Preservation - 9012	\$53.33	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00
Case Management - Family Preservation - 9012	\$55.00	766.75	\$42,171.25	0.00	\$0.00	766.75	\$42,171.25
Counseling - Substance Abuse - 9031	\$52.82	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00
Counseling - Substance Abuse - 9031	\$54.40	138.00	\$7,507.20	0.00	\$0.00	138.00	\$7,507.20
Counseling-Domestic Violence - 9030	\$50.07	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00
Counseling-Domestic Violence - 9030	\$51.56	156.25	\$8,056.25	0.00	\$0.00	156.25	\$8,056.25
Parent Training - Family Preservation - 9151	\$39.46	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00
Parent Training - Family Preservation - 9151	\$46.71	83.75	\$3,911.96	0.00	\$0.00	83.75	\$3,911.96
Program Total:		1,144.75	\$61,646.66	0.00	\$0.00	1,144.75	\$61,646.66
Agency Total		1,144.75	\$61,646.66	0.00	\$0.00	1,144.75	\$61,646.66