

# COVID-19 Reporting in A&D/SAMS

## Roster set-up with COVID site

***Only to be used during the COVID-19 pandemic to record services provided that were outside of normal processes due to COVID-19.***

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If your agency does not use SAMS, please contact your ADSD Grants and Projects Specialist (GPS) for guidance, as necessary.

Examples of when you use a roster or service delivery with COVID listed as the Site:

- Provision of a new service that was developed to meet new or increased client needs during the pandemic; or provision of approved services for ADSD subawards received through normal funding processes that are unique due to COVID (e.g., virtual services, new home-delivered services that weren't previously provided, etc.).
    - If you need a type of service added to SAMS in order to report your COVID activities, please contact your GPS as soon as possible. Be sure to add the COVID site to your Roster or Service Deliveries to properly log activities.
    - If you are not sure how to report, please email your GPS for direction.
  - Provision of home-delivered meals (HDM) to clients who are only homebound due to COVID.
    - This can include clients from the waitlist who were added to the program due to COVID or emergency funds received.
    - Regular HDM should be reported without the COVID site added. (Normal reporting)
  - Provision of drive-thru meals to known clients as an alternative to congregate meals.
    - These are considered COVID home-delivered meals.
    - See ADSD instructions for Anonymous Drive-Thru Meals to report meals provided to unknown individuals.
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In Wellsky A&D/SAMS:

- Choose **Rosters** from the main menu across the top of the screen:



- Once the Rosters menu is open, click **Add New**:

A screenshot of the 'Add New' button, which is a blue rectangular button with the text 'Add New' in white.

Use the following as a guide to create the Roster:

- **Name** = Input a name for the roster that will help you easily identify it.
  - Example: “[Your Agency Name] - [Name of Service] COVID reporting”
- **Type** = choose “Specified Service”

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- **Care Program** = This depends on the type of funding you received from ADSD.
  - In most cases, if the funding was Federal, use “National Aging Program Information Systems”
  - In most cases, if the funding was State, use “RD Other”
  - Contact ADSD for assistance if these care programs do not work, or if the care program you typically use do not work (i.e., NAPIS-Secure; NAPIS Dual Funded; RD Other-Secure; RD Other Multi-Funded)
  - Ensure clients have the proper Care Enrollment in their file.
- **Agency** = “Aging Services”
- Choose your organization as the **Provider**.
- **Site** = “COVID”
- **Based On** = “Service Delivery”
- Skip down to the **Service Filters** section.
  - **Provider** = click folder to open list of providers and choose your agency. Click ok.
  - **Service** = find the section related to your Care Program (NAPIS or RD Other (RDO)). Then find the service you were funded for within that section (e.g., NAPIS-Homemaker; RDO-Transportation; NAPIS-Home Delivered Meals; etc.) and choose it. Click ok.
    - If you also want SAMS to pull a list of clients from a different service provided by your agency, you may also add that service as a filter.
  - **Day Range** = if this is a service you have had for a long time, you can filter the roster to show more current clients only by using this field. You can adjust this filter later as necessary.
- Do not add additional filters on the **left side** of the screen. This will over-filter your client list and may remove certain clients.
- Scroll to the top of the screen. On the right side, you will see a **Services** section. Click **Add New**.

### Services

[Add New](#) | [Open](#) | [Delete](#) | 

- **Service** = Choose the service for which you will be entering COVID-related data and click ok. If you do not see the service listed, contact your GPS for assistance.
- Roster is ready. Click Save and Close.

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- Before choosing the Roster to enter data, you may need to click Refresh to reload the list of available Rosters.
- To enter data, find the new roster in the list, click it once to highlight it, then choose Record Roster.
  - Choose the month and year of data you will be entering. Click ok.
  - The roster will load for the month you chose. If you do not see a certain client listed, click on Add Consumer, to search for them and add them to the list. Once you save units for them within the roster, they will show up on the list the next time you open the roster.
    - If you have trouble adding clients, ensure their records contain the correct Care Enrollment and your agency is listed as a Provider. Also verify start dates for the Care Enrollment and Provider listing are on or before the day you first provided service to the client.

You may also enter service deliveries directly in client files. If the services are related to the COVID pandemic, choose "COVID" as the Site to correctly log the service for reporting purposes.

Once you have entered regular data and data with the COVID specified as the Site, you may now run reports that group/separate your service provision by Site to see total services provided for each.