

user
organization

n	where	topic	<input checked="" type="checkbox"/>	User's task	User Guide
			<input checked="" type="checkbox"/>	User's task	1.6.5
1	email		<input type="checkbox"/>	receives 2 emails with user credentials & Password	
2			<input type="checkbox"/>	notifies Point-person that emails were received	
3	Portal	My Configuration	<input type="checkbox"/>	logs in to portal & changes password	
4		My Configuration	<input type="checkbox"/>	sets account security questions	
5	Portal	Harmony Quick Links	<input type="checkbox"/>	review Harmony Training materials	(p. 44)
4		Application Support Resources	<input type="checkbox"/>	locate SAMS-3 User Guide (Harmony's manual)	
6	SAMS	My Settings	<input type="checkbox"/>	sets User Defaults	(p. 5)
7		My Dashboard	<input type="checkbox"/>	sets Saved Search Widgets on Dashboard	(pp. 6-10)
8	SAMS	your practice consumer(s)	<input type="checkbox"/>	search for consumer	
9			<input type="checkbox"/>	add assessment to existing consumer	(pp. 15-22)
10			<input type="checkbox"/>	create new consumer, add assessment	(pp. 15-22)
11			<input type="checkbox"/>	save assessment with workflow triggers	(pp. 23-25)
12			<input type="checkbox"/>	enter MDS-HC data & narrative	
13			<input type="checkbox"/>	attach scanned document to consumer record	(p. 24)
14			<input type="checkbox"/>	add contact of type Next of Kin	(pp. 29-30)
15			<input type="checkbox"/>	add CAE enrollment	(p. 32)
16			<input type="checkbox"/>	Add Activity & Referral	(pp. 33-33)
17			<input type="checkbox"/>	review workflow pane, mark task(s) completed, clear all triggers	(pp. 24-27)
18	SAMS	a colleague's consumer(s)	<input type="checkbox"/>	Locate your Colleague's consumer (using Widget, using Consumer List)	
19			<input type="checkbox"/>	Review Consumer Details (SSN, MassHealth #, Contacts)	(p. 17)
20			<input type="checkbox"/>	Review MDS-HC assessment (print preview)	(pp. 22-24)
21			<input type="checkbox"/>	Review File Attachments (open & view PDF)	
22			<input type="checkbox"/>	Review Enrollment	
23			<input type="checkbox"/>	Review Activity & Referral	
24			<input type="checkbox"/>	Update Activity/Referral - update comments, change status	
			<input type="checkbox"/>	close & save consumer	
25	SAMS	all organization's consumers	<input type="checkbox"/>	Review Dashboards. Refresh Dashboards to see updated A&Rs.	
26			<input type="checkbox"/>	Review Consumer List	
27	SAMS	My Settings	<input type="checkbox"/>	Refresh Application Resources	(p. 42)
28	Portal	Login	<input type="checkbox"/>	Practice Forgot Password	
29	AGD-Support		<input type="checkbox"/>	Get current AGD User Guide	