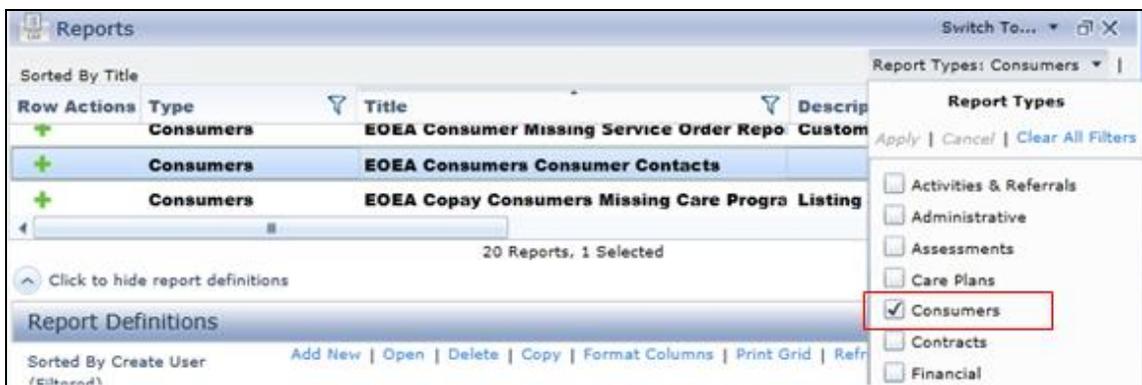


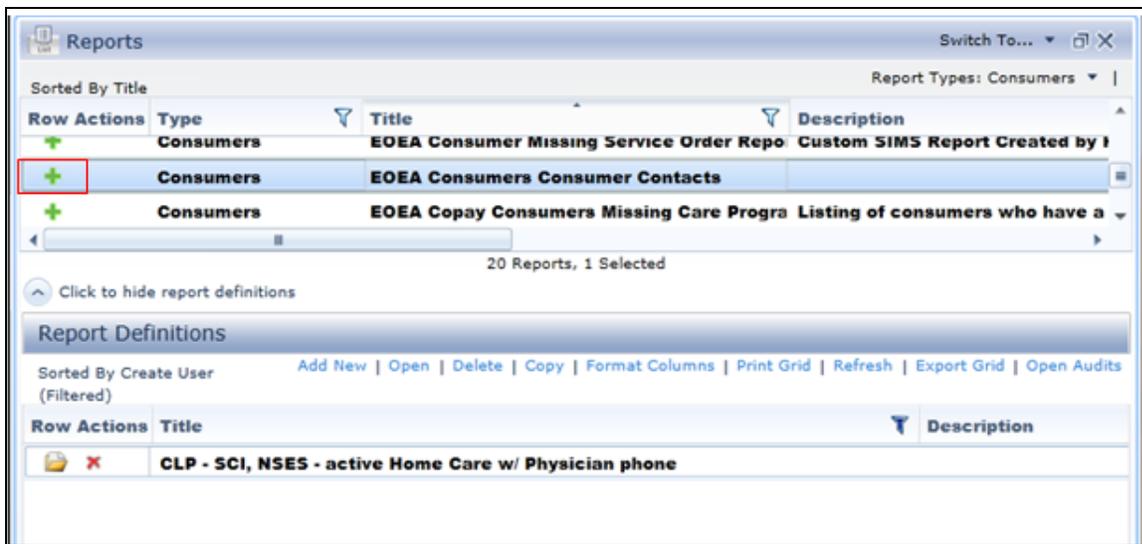
## Community Links Portal for Professionals – Creating a Community Links Consumer Match Report (for ASAPs)

*Using a standard SAMS report, the ASAP can retrieve a listing of all active Home Care program consumers along with their physicians' names and contact information. Using this data in Excel spreadsheet format, the ASAP can identify HCOs with shared consumers.*

1. Open the **Reports** section in SAMS
2. Under **Report Types**, select **Consumers** and click **Apply**



3. Select the Report template (top part of screen) named **EOEA Consumers Consumer Contacts**, and click the **+** next to the report template name.



- Name your report according to your agency's protocol, and add settings and filters as shown. (Add your agency as the Default Agency in the Care Providers section)

The screenshot shows a report configuration interface with the following sections and settings:

- Title:** BSHC - Community Links Consumer Matching Report
- Shared With:** (All)
- Modifications Allowed:** (All)
- Report Settings (6/10):**
  - Choose Columns for Consumer:** (6 Items selected)
  - Print Parameters:** Selected Only
  - Group By:** Agency
  - Group Per Page:** No
  - Sort By:** Last Name
  - Contact Type:** (3 Items selected) - **Select Contact Type** dropdown is highlighted with a red box, showing:
    - Description
    - Alternate Physician
    - Primary Physician
    - Speciality Physician
  - Include Consumers with No Selected Contacts:** No
  - Show Primary Only:** No
  - Suppress Contact Line:** No
  - Excel Export:** Yes - highlighted with a red box
- Report Header:**
  - Care Enrollment:**
    - Care Program:** (5 Items selected) - **Select Care Program** dropdown is highlighted with a red box, showing:
      - Description
      - Choices / Waiver
      - ECOP / Non-Waiver
      - Home Care Basic / Non-Waiver
      - Home Care Basic / Waiver
      - Respite / Over-Income
    - Enrollment Status:** Active
    - Service Program:** (Any)
    - Enrollment Start Date (on or after):** Enter date
- Care Providers (1/22):**
  - Default Agency:** Boston Senior Home Care - highlighted with a red box
  - Primary Care Managers:** (Any)
  - Primary Care Manager Provider Role:** (Any)

\*Note that all date filters are left blank. You are only looking for consumers with active home care enrollments.

- Click the arrow next to **Preview**, and select **Microsoft Excel data**

The screenshot shows a report definition window titled "Report Definition - EOE Consumer Consumer Contacts - CLP - SCI, NSES - active Home Care w/ PH". The "Preview" dropdown menu is open, and "Microsoft Excel data" is highlighted with a red box. Other options in the menu include Adobe PDF, Crystal Viewer, Microsoft Excel, Microsoft Word, Text, and XML.

- Open document when prompted to view the raw spreadsheet data. (Consumer PHI columns hidden in this screenshot)

ClientID	Inactive	ConsPh	ConsPh	ConsAd	ConsCit	ConsStz	ConsZip	ConsCo	ConsMu	Primary	ContBill	ContPrii	ContNar	ContPh	ContPh	ContPhv	ContPhz	ContPhl	ContTyp	ContAdk
1	#####	Home	978		Peabod MA	01960	Essex			Joan Gallagher (CM)		Dr Didd *	Business	978	538-4300			Primary	Physicia	
2	#####	Home	781		Marbleh MA	01945	Essex			Ariel Engler (CM) NSES		Dr. Cyn *	Business	781	631-5126			Primary	Widger F	
3	#####	Home	978		Peabod MA	01960	Essex			Rosalie Whelton (Sup)		Marvin *	Business	978	532-2800			Primary	2 Essex	
4	#####	Home	978		Peabod MA	01960	Essex					Dr. Jacl *	Business	781	631-5454			Primary	1 Widger	
5	#####	Home	978		Peabod MA	01960	Essex					Eduardo *	Business	978	532-4578			Primary	6 Essex	
6	#####	Home	978		Peabod MA	01960	Essex					Dr. Rod *	Business	978	744-8388			Primary	Physicia	
7	#####	Home	978		Peabod MA	01960	Essex					Dr. Rod *	Business	978	744-8388			Primary	Physicia	
8	#####	Home	978		Peabod MA	01960	Essex					Dr. Mon *	Business	508	674-5200			Primary	Physicia	
9	#####	Home	978		Peabod MA	01960	Essex					Dr. Geri *	Business	617	732-6770			Primary	15 Franc	
10	#####	Home	978		Peabod MA	01960	Essex					Damian *	Business	978	532-4903			Primary	Family N	
11	#####	Home	978		Peabod MA	01960	Essex					Damian Archer	Fax	978	532-4995			Primary	Family N	
12	#####	Home	978		Peabod MA	01960	Essex					Dr. Lili *	Business	978	927-1919			Primary	Physicia	
13	#####	Home	803		Salem MA	01970	Essex			Catarina Bettencourt (Cl) Rodrigo *			Business	978	744-8388			Primary	47 Congr	
14	#####	Home	978		Middlec MA	01949	Essex			Carol Mac Millan (CM)		Jonatho *	Business	781	729-0788			Primary	15 Dur St	
15	#####	Home	781		Marbleh MA	01945	Essex			Galina Nikonovskaya (Cl) Dr. Mict *			Business	781	592-6005			Primary	49 Ocean	
16	#####	Home	978		Peabod MA	01960	Essex			Joan Gallagher (CM)		Heleen L *	Business	617	732-5500			Primary	Physicia	
17	#####	Home	978		Danvers MA	01923	Essex			Casey Horrigan NSES (C) Dr Lenh *			Business	978	468-7346			Primary	Physicia	
18	#####	Home	207	#2	Salem MA	01970	Essex			Galina Nikonovskaya (Cl) Spencei *			Business	978	922-3622			Primary	900 Curt	
19	#####	Home	978	# 214	Peabod MA	01960	Essex			Melissa Daly (CM)		Gary Cc *	Business	978	745-1575			Primary	Physicia	
20	#####	Home	978		Salem MA	01970	Essex			Galina Nikonovskaya (Cl) Richard *			Business	978	745-1200			Primary	331 High	

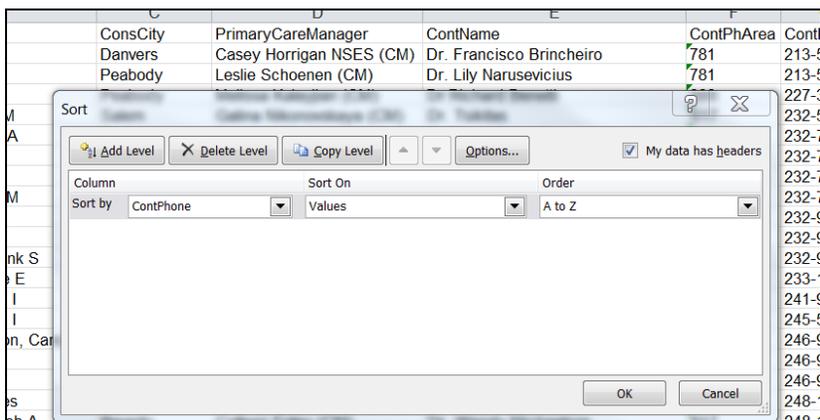
7. Remove (or hide) unwanted columns. In this example, the remaining columns headings are listed below. Feel free to include all columns that are of interest to you. Rename the columns if desired.

Cons = Consumer / Cont = Contact

- ClientID
- ConsName
- ConsCity
- PrimaryCareManager
- ContName
- ContPhArea
- ContPhone
- ContType
- ContAddr1
- ContAddr2
- ContCity
- ContZip\*
- Agency

\*There are 2 ContZip columns. The second one contains the full contact address condensed into one column – helpful when sorting by address.

8. Sort (select Data from mail toolbar/ Sort) the spreadsheet by the phone number column (ContPhone), or by contact address (ContZip\*)



9. With the phone number(s) and address(es) from the HCO office(s) handy, scan the list for large collections of consumers with a matching phone number or addresses, and highlight. (Or copy and paste to another worksheet or document.)

Middleton	Carol Mac Millan (CM)	Agnes Jimenez	978	524-8181	Primary Physician	
Danvers	Casey Horrigan NSES (CM)	Dr. Agnes Jimenez	978	524-8181	Primary Physician	
Danvers	Naomi Marrero (CM)	Natale Majorek, MD	978	524-8181	Primary Physician	629 Hale S
Danvers	Carol Mac Millan (CM)	Dr. Jimenez	978	524-8181	Primary Physician	100 Cumm
Danvers	Carol Mac Millan (CM)	Nancy Splinter NP	978	524-8181	Primary Physician	
Danvers	Barbara Byrne (CM)	Dr. Agnes Jimenez	978	524-8181	Primary Physician	100 Cumm
Leabody	Robyn Nathan (CM)	Marjorie Majorek	978	524-8181	Primary Physician	
Severly	Susan Doughty (CM)	Dr. Jimenez	978	524-8181	Primary Physician	77 Herrick
Severly	Michelle Cohen (CM)	Dr. Pierre Ezzi	978	524-8181	Primary Physician	100 Cumm
Dorwich	Jan Cantone- Gerrior (CM)	Dr. Pierre Ezzi	978	524-8181	Primary Physician	Cummings
Severly	Jan Cantone- Gerrior (CM)	Dr Agnes Jimenez	978	524-8181	Primary Physician	Northeast M
Gloucester	Dianne Bell (CM)	Pierre Ezzi	978	524-8181	Primary Physician	The Medica
South Hamilton	Dianne Bell (CM)	Agnes Jimenez	978	524-8181	Primary Physician	100 Cumm
Severly	Lynn Maker (CM)	Agnes Jimenez	978	524-8181	Primary Physician	100 Cumm
Severly	Judy Lezon (CM)	Dr. Agnes Jimenez	978	524-8181	Primary Physician	900 Cumm
Severly	Colleen Foley (CM)	Pierre Ezzi	978	524-8181	Primary Physician	77 Herrick
Severly	Denise Walter (CM)	Dr Agnes Jimenez	978	524-8181	Primary Physician	100 Cumm
Severly	Jan Cantone- Gerrior (CM)	Dr Agnes Jimenez	978	524-8181	Primary Physician	Suite 106P
Severly	Denise Walter (CM)	Dr.P. Abou-Ezzi	978	524-8181	Primary Physician	77 Herrick
Severly	Michelle Cohen (CM)	Dr. Ezzi	978	524-8181	Primary Physician	Cummings
Severly	Colleen Foley (CM)	Dr. Agnes Jimenez, NP Nancy Sp	978	524-8181	Primary Physician	100 Cumm

You now have a starter match list for CLP!

- Review names with HCO contact
- Sort match list by Care Manager and use it to mobilize CMs to secure consent from the consumers.
- Add area agencies to the report filters to support HCO's efforts to create agreements with additional ASAPs. Give these ASAPs a heads up that an HCO with shared consumers is active in the Community Links Portal.