

Job Aide: Retrieving Information Related to AFC Initial Determinations

Purpose of this Document

This user guide provides an overview of tasks likely to be performed by AFC providers during the transition from **AGD SAMS** to the **MassHealth LTSS Provider Portal** for submission of AFC Initial Determination requests. As of May 1, 2019, all AFC providers are required to submit AFC Prior Authorization (PA) requests through the new portal, (www.masshealthltss.com), and may begin to do so as early as April 16, 2019.

AGD SAMS will continue to be accessible in a read-only format with the ability to download and print historical information. Eventually read-only access to AGD SAMS will no longer be available for AFC information. MassHealth will provide adequate notice prior to closing access to AGD SAMS for AFC users. In the meantime, AFC providers should continue to download documents from AGD in preparation for access termination.

This guide is designed to assist providers in performing common tasks in SAMS associated with this transition.

[The GAFC Initial Determination process is not converting to PA at this time. Until further notice, all GAFC Initial Determinations should continue to be submitted via AGD SAMS.]

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Viewing Your Initial Determinations

Activities and Consumers Sections in SAMS

[*Please Note: AFC providers must withdraw all in-progress Activities & Referrals between 4/16/19 and 5/15/19.]

To view a full list of all *activities & referrals* associated with your provider agency regardless of status, click on the *Activities* section at the top of the page:

Row Actions	Complete?	Subject	Action	Client ID	Consumer Name	Due Date	Date Completed	Status	Primary Care Manager	Create User
	<input type="checkbox"/>	AFC Initial Determination	AFC Initial Assessment	1300066719	Bello, Diane			Not Started		Andy Grigorov
	<input checked="" type="checkbox"/>	AFC Initial Determination, Ian Wilson	AFC Initial Assessment	1301078790	Sakowicz, Heather		07/19/2018	Completed		Caroline Adley
	<input checked="" type="checkbox"/>	AFC Initial Determination, Daniel Whelan	AFC Initial Assessment	1300630914	Lauziere, Vicente		04/11/2018	Completed		Caroline Adley
	<input type="checkbox"/>	AFC Initial Determination, Patrick Hayes 3/5/18	AFC Initial Assessment	1301308871	Williams, Shelly			Waiting		Caroline Adley
	<input checked="" type="checkbox"/>	AFC Initial Determination, Kirsten Donovan	AFC Initial Assessment	1300854296	Adams, Diane		10/1/2017	Completed		Caroline Adley
	<input checked="" type="checkbox"/>	AFC Initial Determination, William Myette	AFC Initial Assessment	1300430414	Kersey, Catherine		08/29/2017	Completed		Miss Innocentia
	<input type="checkbox"/>	AFC Initial Determination, Luke Tharan	AFC Initial Assessment	1300788733	Capella, Dorothy			In Progress		Miss Innocentia

To view a full list of all *consumers* associated with your provider agency, click on the *Consumers* section at the top of the page:

Row Actions	Consumer Type	Active?	ID	Name	Date Registered	Offline?	Address	Town of Residence	County of Residence	Home Phone	Status Date	Default Provider
	Consumer	<input checked="" type="checkbox"/>	1300854296	Adams, Diane	10/21/2017	<input type="checkbox"/>	+009 Adams Road	Wareham	Plymouth	(130) 055-4296	10/21/2017	ARC of Greater Plymouth 1
	Consumer	<input checked="" type="checkbox"/>	1301038780	Anderson, Marc	10/19/2015	<input type="checkbox"/>	+009 Anderson Road	Carver	Plymouth	(130) 833-8780	10/19/2015	ARC of Greater Plymouth 1
	Consumer	<input checked="" type="checkbox"/>	1300066719	Bello, Diane	03/31/2018	<input type="checkbox"/>	+009 Bello Road	Marston Mills	Barnstable	(130) 009-6719	03/31/2018	ARC of Greater Plymouth 0
	Consumer	<input checked="" type="checkbox"/>	1300804943	Bellone, Elnor	03/30/2017	<input type="checkbox"/>	+009 Bellone Road	Xington	Plymouth	(130) 968-4943	03/30/2017	ARC of Greater Plymouth 0
	Consumer	<input checked="" type="checkbox"/>	1300478694	Bersani, Dong	09/29/2015	<input type="checkbox"/>	+009 Bersani Road	Plymouth	Plymouth	(130) 047-8694	09/29/2015	1
	Consumer	<input type="checkbox"/>	1300298650	Bliss, Mary	05/26/2015	<input type="checkbox"/>	+009 Bliss Road	Marshfield	Plymouth	(130) 026-9650	05/26/2015	ARC of Greater Plymouth 0

Both lists are presented as grids, and can be sorted and filtered in many different ways. Grids can also be exported and printed. For a refresher on sorting and filtering grids, please consult the [User Guide for AFC & GAFC Providers](#).

Consumer Record

[*Please Note: “Consumer” is the SAMS term for “member.”]

To view data within the consumer record, double click on a consumer from the list found in the *Consumer* section.

Basic facts about the consumer are presented on the *Details* page. Subsections contain other pertinent data, such as *Activities & Referrals*, *Assessments*, and *File Attachments*.

Consumer - Bello, Diane (1300066719)

+009 Bello Road Marston Mills, MA 02648 2/15/1990 Age: 29 Coastline Elderly Services, Inc.

P: (130) 006-6719

Details | Activities & Referrals | Assessments | File Attachments | Service Deliveries | Service Orders

Save | Save and Close | Close | Reject Changes | Print | Format Panels | Status Wizard | Copy Client ID | Add New

Open Basic Information

Name	Diane Bello
Date Registered	03/31/2016
Consumer Details Last Reviewed	03/31/2016
Gender	Male
DOB	02/15/1990
SSN	300-06-6719
Default Agency	Coastline Elderly Services, Inc.
Active	Yes
Status Date	03/31/2016
Offline?	No
Age	29

NAPIS

Ethnicity	Not Hispanic or Latino
Number of ADLs	4
Is Ethnic Race specified	No

Insurance

Understands English	Yes
Primary Language	English

Other Characteristics

Care Enrollments

CAE	Active	03/31/2016 - (Not Specified)
AFC of Greater Plymouth		

Contacts

RFS - Next of Kin/Responsible Party

John Doe
AFC Initial Determination 3/31/16

Primary Physician

John Doe
MD

Locations

Residence: +009 Bello Road Marston Mills, MA 02648 Barnstable County

Mailing: +009 Bello Road Marston Mills, MA 02648 Barnstable County

Phones

None (130) 006-6719

You can also access a consumer’s record from the Activity record, by clicking on the name link near the top of the Activity screen.

Activity/Referral - AFC Initial Assessment, AFC Initial Determination

Save | Save and Close | Close | Reject Changes | Print | Format Panels | **Bello, Diane**

Consumer Bello, Diane

Subject AFC Initial Determination

Action AFC Initial Assessment

Agency Coastline Elderly Services, Inc.

Comments

4/16/19- this is an initial redeterm

Services

Assessments

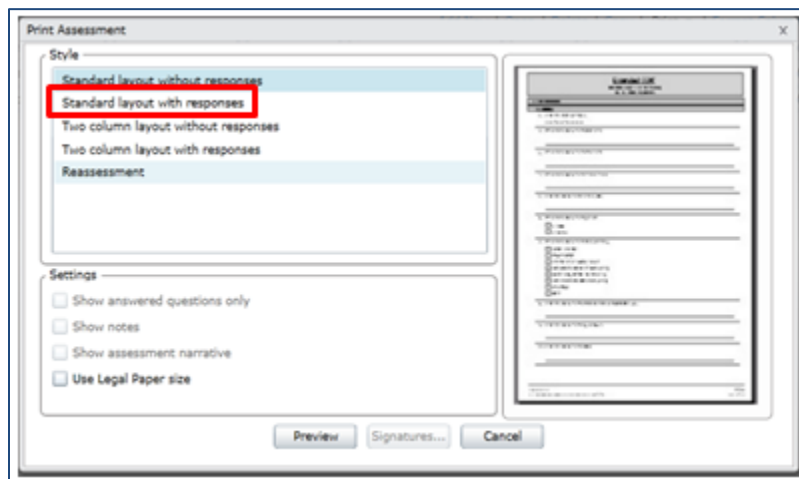
A consumer's Assessments section contains the MDS-HC created by your AGD provider agency, and, if applicable, Coastline's CDS-3-RN.

To Print An Assessment:

1. From the Assessment section of a consumer's record, click on the *print* symbol that corresponds to the desired assessment.



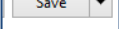
2. You will then be prompted to select a style. A common selection here, if you are interested in printing out the responses, is *Standard layout with responses*.



3. Click *Preview* and this dialog will be presented:



4. To simply print, click *Open* and select print from the document task bar.

If you would like to save as a PDF, click the *Save* dropdown arrow  and "Save as..." to your desired location.

Saving & Printing Attachments

1. To access a consumer's file attachments, navigate to the File Attachments subsection of the desired consumer.

Row Actions	Folder	Description	File Type	File Size	Category	Created Date	Created By	Organization
	ARC of Greater Plymouth (AGD)	AFC Approval- Joshua Norman- 4/7/2016	pdf	35383	Category 2	04/12/2016 12:02:51	Zaida Amaral	Coastline Elderly Services, Inc.
	ARC of Greater Plymouth (AGD)	PSF, Joshua Norman	pdf	73113	Category 2	03/31/2016 5:22:07	Mimi mccoarthy	ARC of Greater Plymouth
	ARC of Greater Plymouth (AGD)	AFC Cover Letter, Joshua Norman	pdf	25785	Category 2	03/31/2016 5:21:05	Mimi mccoarthy	ARC of Greater Plymouth
	ARC of Greater Plymouth (AGD)	RFS, Joshua Norman	pdf	113324	Category 2	03/31/2016 5:15:40	Mimi mccoarthy	ARC of Greater Plymouth

2. Click *once* on the desired attachment, and click *View Attachment*.

Row Actions	Folder	Description	File Type	File Size	Category	Created Date	Created By	Organization
	ARC of Greater Plymouth (AGD)	AFC Approval- Joshua Norman- 4/7/2016	pdf	35383	Category 2	04/12/2016 12:02:51	Zaida Amaral	Coastline Elderly Services, Inc.
	ARC of Greater Plymouth (AGD)	PSF, Joshua Norman	pdf	73113	Category 2	03/31/2016 5:22:07	Mimi mccoarthy	ARC of Greater Plymouth
	ARC of Greater Plymouth (AGD)	AFC Cover Letter, Joshua Norman	pdf	25785	Category 2	03/31/2016 5:21:05	Mimi mccoarthy	ARC of Greater Plymouth
	ARC of Greater Plymouth (AGD)	RFS, Joshua Norman	pdf	113324	Category 2	03/31/2016 5:15:40	Mimi mccoarthy	ARC of Greater Plymouth

3. You will then be presented with the dialog below. *Save* the document to your desired location. You will be able to print the attached materials once saved.

Do you want to open or save **Joshua Norman.pdf** (34.5 KB) from **ma.harmonyis.net**?

Open Save Cancel