



## Kepro SAM Scheduling Portal

<https://pasis.kepro.com/>

### Scheduling Routine 5-Year Assessments

When it is time to schedule routine 5-year assessments, you will be notified by Kepro via email from [PAODPAssessments@kepro.com](mailto:PAODPAssessments@kepro.com) that you have assignments in your queue to complete. This means that you have one or more individuals who had their last SIS Assessment completed at least five years ago and are now ready to be scheduled and require you to enter scheduling information and update the individual's demographics if needed.

Due to HIPAA, the email notification will simply state that 5-year assessment requests have been assigned to you and contain the hyperlink to the Kepro SAM scheduling portal. By clicking on the hperlink in the email: <https://pasis.kepro.com>, you can login and will then see your SC Home Screen where you will be able to view those individuals needing scheduling information.

The email will look like this:

5 year Assessment Request assigned to

<https://pasis.kepro.com>



You will not see the name, MCI or any other identifying information in the email. You will need to log in to Kepro SAM to see those individuals for whom scheduling information is needed.

### Submitting Scheduling Information for Routine Assessments

If you have individuals in your work queue for whom routine scheduling information is being requested, you will see a table that contains the following information:

Request ID	MCI #	Name	DOB	Date of Last SIS	Interpreter?	County	Request Type	Status
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In the Request ID column, next to the individual's MCI and name you will see a blue number that is a hyperlink. Click on that number to open the individual's record. The individual's record will look like this but with demographic information prepopulated.

Consumer Information
COLLAPSE ALL

MCI # \*

SEARCH

REASON FOR EXPEDITED \*

Select One

FIRST NAME \*

MIDDLE

LAST NAME \*

DATE OF BIRTH

ADDRESS 1 \*

ADDRESS 2

CITY \*

COUNTRY \*

United States

STATE/PROVINCE \*

Pennsylvania

REGISTERED COUNTY \*

Select One

COUNTY OF RESIDENCE \*

Select One

POSTAL CODE \*

PHONE \*

EMAIL

INTERPRETER NEEDED? \* IF YES, LANGUAGE \*

Yes  No

RECEIVING RESIDENTIAL SERVICES? \* IF YES, PLEASE DESCRIBE \*

Yes  No

CONTACT NAME \*

CONTACT PHONE \*

CONTACT EMAIL

Please review all fields in the Consumer Information section for accuracy prior to submission.

Once in the record, the demographic information for the individual will prepopulate. Verify that the information is correct and update if needed. All items with a red (\*) must be completed.

***NOTE: The information in this section of the record is for the individual. It is NOT the name of the SC or person to contact when scheduling the assessment.***

In the Interpreter section of the record indicate whether or not an interpreter is needed by selecting "Yes" or "No." If yes, in the text box indicate the language needed, e.g., Spanish, ASL, Bengali, etc.

INTERPRETER NEEDED? \* IF YES, LANGUAGE \*

Yes  No

Next move on to the Residential Services section of the record. Indicate whether or not the individual receives residential services by selecting "Yes" or "No." If yes, enter the type of residential services in text box (agency name followed by group home, lifesharing, etc). Also add the residential contact person (Program Specialist is ideal) along with their contact phone number and email.

RECEIVING RESIDENTIAL SERVICES? \* IF YES, PLEASE DESCRIBE \*

Yes  No

CONTACT NAME \* CONTACT PHONE \* CONTACT EMAIL

Next is the Scheduling Information section of the record. In the best time for scheduling, please indicate a preferred time if needed. Currently, we are only completing remote assessments using Microsoft Teams, so a desired meeting location is not necessary.

The Special Notes section is a good place to list any special circumstances that the scheduler and/or interviewer should be aware of when scheduling or at the time of the interview/ For example, if the individual could be upset if certain things are discussed during the assessment, it would be important to note that the assessor should talk with the SC prior to the interview. Other information that may be important to note is if an interpreter is needed, will he/she be required for the length of the interview, or only to meet the individual as this is helpful to know when arranging for interpreting services as well as who the interpreter is for (e.g., individual, parent, etc.)

Scheduling Information

BEST TIME FOR SCHEDULING  
Select One

DESIRED MEETING LOCATION

SPECIAL NOTES

You are now ready to proceed to Respondent Information where you can enter information for those respondents you wish to participate in the assessment. This is done by clicking on "Add Respondent" which will open fields in which the information can be entered.

Respondent Information

ADD RESPONDENT  Please include a minimum of two Respondents with your submission.

FIRST NAME \* LAST NAME \* EMAIL PHONE \* RELATIONSHIP \* AGENCY

DELETE

SUBMIT

Figure 10: Respondent Information.

All fields with a red (\*) must be completed.

**▲ NOTE:** The SC should be listed as a respondent and that a minimum of two respondents are required. The Legal Guardian must be included where applicable.

When you have entered information for your first respondent, click "Add Respondent" again, to populate fields to add the next person you wish to attend the assessment, and so on until you have all potential respondents listed. Do **NOT** click submit to add a respondent.

**NOTE:** If residential services are provided, please be sure to list all residential contacts with their name, phone number, email and agency name that you wish to attend the assessment.

When choosing the relationship from the dropdown menu, please try to select the type that best corresponds to the relationship/service. In all cases, please include the agency name, if applicable, as well as the email if available.

If you have added a respondent in error, click on the "Delete" button to remove the entry.

Only after you have entered all respondent information should you click "Submit" in the lower right-hand corner of the record. Once submitted the record closes and moves to Kepro for scheduling. You cannot reopen the record to add or change information.

SUBMIT