

What is SMART FACTS?

SMART FACTS is an acronym which stands for **S**eniors **M**edicare **A**ssistance and **R**eporting **T**ool for **F**raud **A**nd **C**omplaint **T**racking **S**ystem.

SMART FACTS is an ‘off the shelf’ software provided by Social Solutions, Inc. and customized for the SMPs to offer:

- Outreach and education tracking
- Volunteer tracking and management
- Complaint management for complex issues and referrals
- Reporting (OIG, AoA, SMPs, etc.)

Since the SMART FACTS software was designed for many groups to use (not specifically for SMPs), certain headings and data descriptions are pre-set and cannot be changed (i.e. **Assessment** and **Entity**). These generic items and how they are used by the SMPs is explained throughout the SMART FACTS Manual and/or job aids.

SMART FACTS Manual

This job aid is **NOT** intended to replace the thorough reporting and policy guidance provided in the SMART FACTS manual. SMP project directors must be familiar with the more detailed and comprehensive information about SMART FACTS found there, including how it is used to meet SMP Program Objectives (see the SMART FACTS Operations Manual).

This job aid **IS** intended as a quick reference guide to using the SMART FACTS software, especially for data entry staff and for users who do not need the level of detail provided in the comprehensive manual.

Launching SMART FACTS

To launch SMART FACTS, take the following steps:

Step	Action
1	Go to the SMART FACTS URL (web portal): www.smartfacts.etosoftware.com
2	Enter your user name and password, select your site (SMP/state) from the drop-down menu, and click Go . <ul style="list-style-type: none"> • <i>Need your login information?</i> Contact your SMP director/coordinator. • If you have trouble logging in, links for “<i>Trouble logging in?</i>” and “<i>Forgot Your Password?</i>” are available on the login page. Also see the SMART FACTS Operations Manual.

Launching SMART FACTS, *continued*

3	<p>Select a Program. There are 3 types of data entry that populate into the OIG Report, and are therefore mandatory for SMPs.</p> <ol style="list-style-type: none"> 1) Outreach & Education 2) Volunteer Tracking & Management 3) Complex Issues & Referrals <ul style="list-style-type: none"> • By entering data in SMART FACTS, you are ‘reporting as you go’. It is important to select the appropriate program PRIOR TO entering data to ensure accurate OIG Reporting. • In addition to the three mandatory programs listed above, an optional program (Partnership Development) is also available for SMP use as determined by each individual SMP. • For additional information on each program, see the SMART FACTS Operations Manual and/or job aid for each program.
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SMART FACTS Tips

The following tips are intended to help you get started with SMART FACTS. See the SMART FACTS Operations Manual and other resources (next page) as needed for more information about SMART FACTS and related policies.

Navigation Tips

- After selecting the program, use the menu on the right side of the screen to navigate to the different areas within each program in SMART FACTS.
- When moving from one field to the next, use the Tab key on your keyboard, or left-click using your mouse.
- Headings which are in bright blue are links. Click the heading name for a description or additional information about that heading or data field.
- Yellow data fields are required fields and must be completed before leaving the screen, or no data on the screen will be saved.
- Use the scroll bar on the right to scroll down to access all data fields.
- Make sure to **Log Off** of SMART FACTS when you are done entering data.

Data Entry Tips

- When entering multiple items, enter similar items together / in a row, since SMART FACTS may pre-fill certain data based on the last entry.

SMP Resources: SMART FACTS Training, SMP Program and Policies, and more

Resource	Purpose	Access Instructions
SMP Resource Center Website	SMP online resources	www.smpresource.org
SMP Resource Manual	General SMP program and policy information	www.smpresource.org : Resources for SMPs > SMP 101, or contact The Center
SMART FACTS Operations Manual	SMART FACTS data entry / policy information	www.smpresource.org : Resources for SMPs > SMART FACTS, or SMART FACTS homepage: http://smartfacts.etosoftware.com , or contact The Center
SMART FACTS Job Aids	Quick reference guides on various topics in SMART FACTS	www.smpresource.org : Resources for SMPs > SMART FACTS > SMART FACTS Training
SMART FACTS Training	Live and/or recorded SMART FACTS webinar training sessions and job aids	www.smpresource.org : Resources for SMPs > SMART FACTS > SMART FACTS Training
The SMP Resource Center (The Center)	Policy guidance and answers to questions regarding SMART FACTS data entry and the SMART FACTS Operations Manual	E-mail: sengelken@smpresource.org , hflory@smpresource.org , or gpaulson@smpresource.org Call: 1-877-808-2468
AoA project officer	Detailed questions and suggested changes regarding AoA reporting, grants procedures, and policies	www.smpresource.org : Resources for SMPs > SMP 101 for the most recent list
SMART FACTS Technical Assistance	Support for software malfunctions & license issues, provided by Social Solutions (software vendor)	Call: 1-866-732-3560 extension 2, or e-mail: support@socialsolutions.com