

CRHMIS User Guide

STEP BY STEP INSTRUCTIONS ON HOW TO NAVIGATE, ENTER,
AND UPDATE REQUIRED DEMOGRAPHIC DATA
WITHIN THE CRHMIS AWARDS DATABASE

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System Requirements

To ensure that AWARDS works correctly for you, care should be paid to meeting the system software and hardware requirements.

Software Requirements – Updated 7/26/17

Supported Browser and Operating Systems

Browsers supported for use with AWARDS are listed in the table below, along with the corresponding operating system(s) in which they can be used. These are the only browsers with which Foothold Technology tests AWARDS. As a result, if you use a browser other than one listed here, you may not experience AWARDS as it was intended to be used.

Browser	Version	Operating System
Microsoft Edge	Most Recent	Windows 10
Google Chrome	Most Recent	Windows 7, Windows 8.1, Windows 10 Mac OS X Chrome OS Linux Android iOS
Mozilla Firefox	Most Recent	Windows 7, Windows 8.1, Windows 10 Mac OS X Chrome OS Linux Android
Apple Safari	Most Recent	Mac OS x iOS

★ Internet Explorer is not a supported browser ★ Windows WP is not a supported operating system

Notes on Browser and Settings Plug-ins

- Safari should not be used in “Private Browsing” mode when accessing AWARDS.
- Within your chosen browser, JavaScript should be set to “allowed” as many aspects of AWARDS require it.
- Set your pop-up blocker to always allow pop-ups from your AWARDS database, as having pop-up blocker enabled can interfere with some functionality (for example, file downloads).
- The Adobe Flash browser plug-in is required in order to use attachments in AWARDS Messages. Attachments will not work with browsers that do not support Flash, such as those in iOS and Android.

Hardware Requirements

AWARDS is optimized for desktop and laptop computers with internet access and up-to-date web browser; however it can also be used with internet-connected mobile devices like tablets or smartphones. Many users successfully access and work with AWARDS via such mobile devices; however, it is important to keep in mind that AWARDS is not mobile-optimized so your experience may vary.

Regardless of the device you choose to use, you are responsible for making sure that it is connected to the internet, up-to-date, and works with any external devices that you use with AWARDS.

Also please keep in mind that the minimum supported screen resolution in AWARDS is 1024x768 on a seven inch screen. If you use a device with a lesser resolution or a smaller screen, your experience may vary.

✍ Note: Specific care should be paid to using AWARDS in a terminal environment and with mobile devices.

Additional Considerations

Encryptions

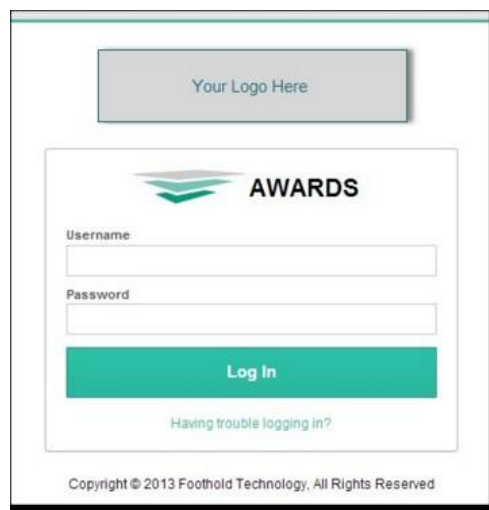
While use of AWARDS does not require that the device you're using be encrypted, encryption is a critically important and highly recommended piece of technology in today's information technology environment. Encryption makes data indecipherable to unauthorized individuals – including anyone acting maliciously – unless they have the shared “key” to unlock the data. This protects any protected health information you may have downloaded from AWARDS to your device in the event that it is compromised or stolen.

Logging Into and Out of AWARDS

In order to access and work within AWARDS it is necessary to launch an AWARDS database session using an internet browser, and log on to the application. When you are done using AWARDS you must log out in order to close the database session, ensuring that no one else can access your data without logging onto AWARDS him or herself. For added security, if during your use of AWARDS you are inactive for a specified length of time, you will be logged out automatically. You will then need to “re-authenticate” your login in order to resume work in the database.

Logging In

- Open an Internet browser
- Enter your AWARDS URL into the browser and press <Enter>. The AWARDS Login page is displayed
The AWARDS URL is <https://cares.footholdtechnology.com>
- In the fields provided, type a valid AWARDS username and password.
 - A Cares Inc. HMIS team member will issue your user name
 - For the initial log in the default password of **cares1234** will be used**The default password of cares1234 will be used anytime a user's password must be reset by a Cares Inc. HMIS team member**
- Click **Log In** or press <Enter>. The *AWARDS Home* screen is displayed.



Re-Authenticating a Login

At times while using AWARDS, it may be necessary for AWARDS users to “re-authenticate”, meaning sign on to the application again. This occurs if the user is inactive in the application for more than 15 minutes and then clicks a button in AWARDS. During the re-authentication process, the user is required to re-enter his or her username and password. Once that has been done, he or she will be returned to the previous page.

Logging Out

To log out of AWARDS and exit the application, click the User Name drop-down from the navigation bar and then click Log Out. Close your browser to complete the process of exiting out of AWARDS

▲Warning! A user must log out in order to end the AWARDS database session. If this is not done, others may access AWARDS from your computer without entering a password.

Password Reset Functionality

AWARDS contains Password Reset functionality that enables you to quickly and easily regain access to the system if you forget your username and/or password. As an AWARDS user, you need to complete a few quick data entry steps to make sure you can take advantage of this helpful tool. Upon logging in to AWARDS for the first time with your username and default password (**cares1234**) follow the prompts to change your password. After successfully changing your password follow the prompt to record your security details.

1. Select a Security Question from the selection menu (You do not need to enter any password information at this time)

2. Type in your answer to the question in the Security Question field
3. Enter your work email address in the corresponding field
4. Click update.

Password & Security Details for Kell Trainer
New and Confirm Password are not required when adding or updating Security Question and Answer

<p>New Password</p> <p><input type="password"/></p> <p>* Security Question</p> <p>When you were a child, what did you want to be when you grew up? <input type="text"/></p> <p>What is the last name of your favorite childhood friend? <input type="text"/></p> <p>In what city was your first (or favorite) job? <input type="text"/></p> <p>What are the last five digits of your driver's license number? <input type="text"/></p> <p>Who was your childhood hero (real or fictional)? <input type="text"/></p> <p>Where did you meet your spouse? <input type="text"/></p>	<p>Confirm Password</p> <p><input type="password"/></p> <p>* Security Answer</p> <p><input type="password"/></p> <p>Personal Email</p> <p><input type="text"/></p>
---	---

characters long and contain both letters and numbers, and may contain special characters.

Additional Password Policy Rules

- Require password change on first login.
- Require password change following admin password reset.
- User must change password at least every 90 days.
- Warn user for 10 days before password expiration.
- Allow an initial implementation grace period of 5 days before password expiration.
- User may change password at most 5 times per day.
- New password must be different than previous 1 passwords.
- Lockout user after 10 failed attempts for 10 minutes.

Additional Email Functionality Rules

- Username and Password reminder emails can be sent to Work or Personal email address.
- External notification emails can be sent to Work or Personal Email address.

From now on you will be able to use the handy “forgot” links on the login page to get back on track without having to call your CSR. When you click on one of the “forgot” links you’ll be prompted to enter a combination of info from you Password & Security information so that AWARDS can confirm your identity. Depending on which link you used, you’ll be sent an email with either your username, or a way to reset your AWARDS password. If you get stuck at any point in the process, click the “Having trouble logging in” link for assistance.

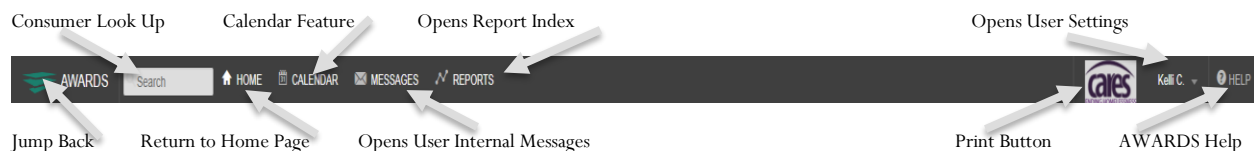
- ⚠ Warning!** This functionality will not work if your log in credentials have been disabled by CRHMIS staff due to non-compliance with any of the User Responsibilities as outlined in the CRHMIS Policies and Procedures Manual.

AWARDS Structure

Top Navigation Bar

The top navigation bar offers access to the following features and displays throughout AWARDS.

This bar will adjust to fit the screen resolution being used, and will display smaller icons on smaller screens.



Consumer Lookup/Search

Click the **Search** box to open the Consumer Lookup options

- Enter any combination of search criteria (first and last name ect...)
- Click the green Search button
- Consumer Lookup Results page is displayed
- Clients who are in programs that the user has chart access to will display as a blue link
- User can click link to view the client’s program history including
- Entitlements, Employment, Hospitalization, Face Sheet, Progress Notes, Service Plans, Timetable, and Contacts Log
- Clients who are in programs that the user does not have chart access to, or are in a different agency but have agreed to data sharing will appear with no link attached.

Consumer Lookup Search

First Name <input type="text"/>	AWARDS ID <input type="text"/>
Last Name <input type="text"/>	Personal ID <input type="text"/>
SSN <input type="text"/>	
Birthdate <input type="text" value="mm/dd/yyyy"/>	
Number of Results: <input type="text" value="25"/>	
<input type="button" value="Cancel"/> <input type="button" value="Search"/>	

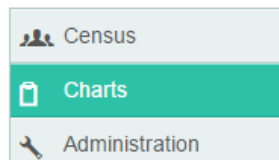
Consumer Lookup Results
 Search for: First_Name=Fake Last_Name=Client
 Maximum Matches to Display: 25

Clone	Personal ID	AWARDS ID	Name	SSN	DOB	Gender	Identity	Race	Status
	415a25-6767-bf916	250743041	Client, Fake	999-99-9999	07/15/1982	Male		Black or African American	Training Nightly Emergency Shelter Resident 12/03/2017 to 12/05/2017
	274147		client, fake	999-99-9999	02/08/1964	Female		American Indian / Alaskan Native	09/24/2012 Referral to Albany County DSS - Various - Psychosocial Screening as of 09/24/2012
	294992		CLIENT, FAKE	999-99-9999	01/01/1980	Male		American Indian / Alaskan Native	07/15/2013 Referral to Albany County DSS - Various - Psychosocial Screening as of 07/15/2013

Left – Side Menu

The menu to the left contains module buttons that direct users to the corresponding Menu pages, for data entry and reporting

Home



Census – Intake/ Admission, Discharge, Housing, Profile

Chart (default view) Employment, Entitlements, Hospital, Incidents, Medical, Outcomes, Reception Desk. Services

Administration - Agency File Cabinet, Fiscal/Program In-House Accounts, Operations, Report Menu, Rolodex, System Setup

Contacting the HelpDesk

Sending client level information through regular email is strictly prohibited. All communication involving client level information must be submitted through the AWARDS HelpDesk.

In the event you need submit a problem/question to the local Help Desk staff at your agency/continuum) complete the following steps:

1. From the navigation bar, click **Help**, and then click **Help Desk**. The *How Can We Help You?* page is opened in the AWARDS Messages module.

A screenshot of a web form titled 'How Can We Help You?'. The form has a light blue header with the title and a goal statement. Below the header is a 'Search Online Help' section with a search bar and a 'Search' button. Underneath is a 'Contact the Help Desk' section with a 'To:' field containing 'P Rossi, Rachel M, Dora Explorer, Donald Demaine, Captain Crook'. There is a 'Subject*' field and a 'Problem/Question Details:' section with a 'Description*' field. The form is designed for users to submit questions or problems to the Help Desk.

This page can also be opened from within the Messages module directly by using the "Helpdesk" link on the left-hand side of the page.

2. In the **Subject** field, please type a brief description of the problem or question.
3. In the "Problem/Question Details" portion of the form, configure the available fields and options as follows:
 - **Description** - In this text box please type a detailed description of your question or problem. When reporting a problem, be sure to list any steps taken prior to the problem's occurrence, including any selections made while completing the problematic task and the text of any error messages received. That detail will enable the Help Desk to replicate your experience as closely as possible and will speed up the investigation process.

When filling out the reporting form, keep in mind that the Help Desk is a totally secure means of requesting assistance which allows you to include detailed information regarding client records without breaching confidentiality.

4. If available, please attach screen shots or files related to your problem or question in the "Attachments" portion of the form.
5. Click **SEND MESSAGE**. If you are an end user, the message is sent to all members of your agency's/continuum's local Help Desk team, and any of those individuals (listed above the Subject field on the reporting form) may review your submission and respond to you.
6. Periodically check your AWARDS Messages module inbox for a response to your problem report or question. When a response is received, review it carefully. In the event that the Help Desk was unable to investigate with the amount of information provided, you will be asked to supply additional details. Otherwise, you will be provided with information about the area of the application you were working with, or with a resolution to any problem you may have been experiencing.

Admissions

Processing a First Time Admission

1. Select **Intake/Admission** on the AWARDS Home screen. The *Intake Records Search* page is displayed

2. Click the **Program** drop-down arrow and select the program associated with the consumer to be admitted.
3. In the **First Name**, **Last Name**, and/or **Alias** fields, type the consumer's name, initials, and/or alias.
4. Click **CONTINUE**. The *Referral Search Results* page is displayed.

Training 1
Intake / Admission Search Results

Referral Source Type: All Sources
Referrals Screened From 02/03/2016 to 08/03/2016
Name: * * *
Application Status: all undecided dispositions - all resolved outcomes

Screencast	Applicant	Birthdate	SSN	Status	Updated	Program	Eligibility	Source	Forms Received	Days Open	Admission Date	Discharge Date
07/01/2016	Create New Application											
07/01/2016	Ike Blain	01/01/1983	999-99-1234	Accepted-Admission	07/01/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		07/01/2016	
04/18/2016	Apple Brown	01/01/1980	999-99-9999	Accepted-Admission	04/18/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		04/18/2016	04/28/2016
06/03/2016	Apple Brown	01/01/1980	999-99-9999	Accepted-Admission	06/03/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		06/03/2016	06/15/2016
04/12/2016	Baby Bush	01/01/2018	999-99-9999	Accepted-Admission	04/12/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		04/12/2016	04/28/2016
03/30/2016	Felix Client	01/01/1980	999-99-1234	Accepted-Admission	03/30/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		03/30/2016	04/06/2016
04/27/2016	Sedentary Crab	01/01/2001	999-99-1234	Accepted-Admission	04/27/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		04/27/2016	05/04/2016
01/26/2016	Adamant Eagle	04/01/1975	999-99-9999	Accepted-Admission	01/26/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		01/26/2016	02/27/2016
01/26/2016	Anxious Cow	03/01/2014	999-99-9999	Accepted-Admission	01/26/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		01/26/2016	01/27/2016
06/01/2016	Anxious Head	01/01/2015	999-99-9999	Accepted-Admission	06/01/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		06/01/2016	06/02/2016
05/03/2016	Anxious Head	01/01/1980	999-99-9999	Accepted-Admission	05/03/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		05/03/2016	06/02/2016
05/02/2016	Anxious Head	01/01/2010	999-99-1234	Accepted-Admission	05/02/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		05/02/2016	06/02/2016
01/29/2016	Member of Household	01/01/2000	999-99-9999	Accepted-Admission	01/29/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received			
01/29/2016	Member of Household	01/01/1998	999-99-9999	Accepted-Admission	01/29/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received			
06/01/2016	Baby McPerson	01/01/2015	999-99-9999	Accepted-Admission	06/01/2016	Training 1	Undetermined Eligibility	Self-Referral	No Date for Forms Received		06/01/2016	06/15/2016

08/03/2016 12:22 PM EDT Footnote 0: 0/0

This page contains a list of any existing intake records for which the identifying information matches that entered on the Intake Records Search page.

5. From the "Applicant" column, click **Create New Application**. The *Admission Form* page is displayed.
6. Complete the admission form by configuring the fields and options on this page as necessary.

Residential programs that are set to collect household information contain a **Residence** drop-down list that is separated into two sections: *Vacant Units* and *Occupied Units*. The beds listed under *Vacant Units* belong to apartments/units where all beds are listed as vacant. The beds listed under *Occupied Units* belong to apartments/units where at least one bed is already occupied. Selecting a bed listed under *Occupied Units* places the client in a unit with roommates, which may be other household members.

Depending on the programs funding source a program may require more data entry at intake/admission than other programs, so the fields and options on the admission form may be different from program-to-program.

7. Click **HOUSING ADMISSION** or **PROCESS ADMISSION** (which label is used for this button is determined by the program type - residential or non-residential, respectively). The consumer's admission form is saved, he or she is admitted to the selected program, and the *Household Composition* page is displayed.

If any data entry errors are found by AWARDS after *HOUSING ADMISSION* / *PROCESS ADMISSION* is clicked, the admission process is halted and the errors are listed in red at the top of the page. In the event that an error is received, make any necessary corrections, and click the appropriate button again before proceeding.

1. From the AWARDS Home screen, click **Intake/Admission**. The *Intake Records Search* page is displayed.

Intake / Admission Search

Program Database
 Sample Program Data Entry

1. Search for existing referrals using identifying information:

First Name	Last Name	Alias	SSN

OR enter a screening date range:

Date Range
 07/05/2013 to 07/01/2014

0 Matching Records

2. Limit the search by selecting the number of referral matches to be displayed on the results page

LIMIT Search Results To 25 Matches

CONTINUE

Merge Duplicate Sources

Jump Back | Opening Menu | Help Menu | Log Out

2. Click the **Program** drop-down arrow and select the program associated with the consumer who is being readmitted

3. Click the **Database** drop-down arrow and select "Data Entry."

4. In order to access the admission record to be updated, a search must be performed from this page. Limit the results of this search in one of the following ways:

- **By Name** - To limit referral record selection by consumer name, type his or her name, initials, and/or alias into the **First Name**, **Last Name**, and/or **Alias** fields, respectively.
- **By Screening Date** - To limit referral record selection by date range, make adjustments to the default values in the "from" and "to" **Date Range** fields. Only those referrals with screening dates in the range entered here are included in the search results.

5. Click **CONTINUE**. The *Referral Search Results* page is displayed.

[illegible]

6. From the "Applicant" column, click the name of the consumer being re-admitted.

7. Click the radio button next to Create a new intake record and re-admit _____ to this program.

Training - Permanent Housing

Admission Form: **John Doe**

The selected admission record has been used to admit John Doe who has since been discharged. This record cannot be used for re-admission. Please select one of the following options:

☒ Edit the demographic fields of this intake record

☐ Create a new intake record and re-admit John Doe to this program

CONTINUE

Intake Menu

8. Click **CONTINUE** the admission form is displayed with prepopulated data from the client's last admission

Enter and update the admission form with current data and click **Housing Admission**. Be mindful to update the Living Situation section of the admission form. Not doing so will not allow the system to update the number of times a person has been homeless

Household Composition

The *Household Composition* page displays differently depending on whether the newly admitted client is already a member of a household in the agency or not.

This client is currently not in a household

1. If the client is currently not in a household and should be placed in a new household, select **Create a new Household**. This option creates a brand new household in AWARDS, and places the client into the household as the primary client.
2. In the **Start Date** field, type the date on which the client became associated with the household, or click (click to insert below) under the client's admission date.

- ***This date MUST be the SAME DATE as the consumers Project Start/Admission Date***

3. If the client is currently not in a household and should be placed in an existing household in AWARDS, select Join an existing Household.
4. AWARDS first prompts users to search for a client record that matches that of the household member. If they have been a client of the agency in the past, less data entry is required.

- In the First Name, Last Name, and SSN fields, type identifying information for the household member whose household the person is being added to.
- Click CONTINUE. The *Household Search Results* page is displayed.
- Beneath the table of search results, in the Living With Household portion of the page, if the household member being added does not actually reside with the primary client and you wish to capture that detail, click the "No" radio button. The "Yes" radio button is selected by default.
- Click the Relation to Primary Client drop-down arrow and select the relationship that describes the new household member in regard to the household's primary client.

First Name	Last Name	Program History(s)	SSN	Date of Birth	Gender
Joe	Black	Transitional Housing One - 04/13/2011	314-00-4284	08/07/1980	Male
Joe	Black	Emergency Shelter Program - 06/13/2010 to 06/13/2010	314-00-4248	08/07/1980	Male
Joe	Black	Emergency Shelter Program - 06/13/2010 to 06/13/2010	314-00-4248	08/07/1980	Male
Joe	Black	Emergency Shelter Program - 06/13/2010 to 06/13/2010	314-00-4248	08/07/1980	Male
Joe	Black	Emergency Shelter Program - 06/13/2010 to 06/13/2010	314-00-4248	08/07/1980	Male

- 6. In the Start Date field, type the date that the new household member became a member of the household. Click CONTINUE

This client is currently in a household

A. To confirm the client's placement in that household, select Client should remain in their current household.

The screenshot shows a form with two radio button options. The first option, 'Client should remain in their current household', is selected. The second option is 'Remove Client from current household and create/join a new household.' Below the options is a 'CONTINUE' button.

B. If the client is no longer part of the current household and should be placed in a different household, select **Remove Client from current household and create/join a new household**, and then click **CONTINUE**.

*The client is removed from the household and an updated Household Composition page is displayed, asking you to create a new household or have the client join an existing one.

Adding Household Members

After completing the steps to put the primary client in a household users have the ability to add/admit additional household members

1. From the Household Composition page select **Yes** to add another member to the household and click **CONTINUE**

The screenshot shows a page titled 'Training 1 Household Composition' with 'Household ID: 216298' and 'Apple Blossom'. Below this is a table with the following data:

First Name	Last Name	Date of Birth	SSN	Relation to Primary Client
Apple	Blossom	01/01/1980	999-99-9999	Self

Below the table is a prompt: 'Would you like to add another member to this household?' with 'Yes' and 'No' radio buttons. At the bottom are 'CONTINUE' and 'FACE SHEET' buttons.

2. When adding a new household member to an existing household, AWARDS first prompts users to search for a client record that matches that of the household member. If they have been a client of the agency in the past, less data entry is required.

- In the **First Name**, **Last Name**, and **SSN** fields, type identifying information for the household member being added to the household. For example, you may enter the first two letters of the household member's first and last names.

The screenshot shows a page titled 'Adult Home One Household Search' with 'Household ID: 336' and 'Maisy Blott'. It prompts the user to 'Enter the first name, last name or SSN of the household member you would like to add.' Below this are input fields for 'First Name', 'Last Name', and 'SSN'. There is a 'Limit Search Results to: 25 Matches' button and a 'CONTINUE' button. At the bottom are 'Face Sheet', 'Jump Back', 'Opening Menu', 'Help Menu', and 'Log Out' links.

- Click **CONTINUE**. The *Household Search Results* page is displayed. This page contains a list of clients with records in the system for whom the identifying information entered on the previous page is a match.

The screenshot shows a page titled 'Household Search Results' with 'Household ID: 400' and 'Riley Apple'. It displays a table with search results. The table has the following columns: 'First Name', 'Last Name', 'Program/Matched', 'SSN', and 'Date of Birth'. The table contains several rows of data, including 'Riley Apple' and 'Maisy Blott'. Below the table are 'CONTINUE' and 'FACE SHEET' buttons. At the bottom are 'Face Sheet', 'Jump Back', 'Opening Menu', 'Help Menu', and 'Log Out' links.

3. Review the search results and determine if the household member to be added to the household appears on the list of matches. If he or she is listed, click the radio button to the left of the name, and continue with the **Living With**

Household portion of the page. If the household member to be added does not appear on the list of matches, continue with the next step.

Clients that appear with the following red icon next to their name already belong to a household within the agency.



As a rule, AWARDS only allows a client to be active in one household at a time. To see the details of the household to which the client belongs, click the red icon next to his or her name, and the Household Composition page for that household is displayed in a pop-up window over the search results page. From there, you can choose to **Edit Household Composition** of that household or **Close**

4. Click the **New Record** radio button. The row refreshes and the following data entry field appear for completion: The **First Name**, **Last Name**, and **SSN** fields are pre-populated with any search criteria entered on the previous page.

- **First Name** - Type the first name of the new household member as it should appear throughout the system.
- **Last Name** - Type the last name of the new household member as it should appear throughout the system.
- **SSN** - Type the SSN of the new household member.
- **Date of Birth** - Type the date of birth of the new household member (using mm/dd/yyyy format), or use the date picker that appears to the right of the field.
- **Gender** - Click this drop-down arrow and select the gender of the new household member.

Training 1
Household Search Results
Household ID: 224877
Abe Blincoln

Search Criteria	
First Name:	Mary Todd
Last Name:	Lincoln

The following results were found.
Please select one of the following matches to add to the household.

First Name	Last Name	Program History(s)	SSN	Date of Birth	Gender
* Mary Todd	* Lincoln		* 999-99-9999	* 1/1/1980	Female

* Indicates Required Fields

5. Beneath the table of search results, in the **Living With Household** portion of the page, if the household member being added does not actually reside with the primary client and you wish to capture that detail, click the "No" radio button. The "Yes" radio button is selected by default.

6. Click the **Relation to Primary Client** drop-down arrow and select the relationship that describes the new household member in regard to the household's primary client.

7. In the **Start Date** field, type the date that the new household member became a member of the household, or use the date picker to the right.

Living With Household	*Relation to Primary Client	*Start Date	End Date
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="text"/>	<input type="text"/>

* Indicates Required Fields

8. Click **CONTINUE**. A pop up message is displayed asking if the household member should be admitted

016	999-99-9999	Daughter	Active	Yes
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Admit Bonnie Bomb?

Would you like to admit Bonnie Bomb into this program?
Clicking Yes will automatically create a referral record for the client.

- If the household member **should** be admitted click **YES** and a pre-populated admission form is displayed for the selected program. Use this form to admit the household member into the program and complete the process.
- If the household member **should not** be admitted click **NO**
- To add another household member to the household, select **Add New Household Member** and complete the above steps
- If no further household members should be added to the household, select **No** and click **HOME** to navigate away from this screen

This process can also be completed from the primary clients face sheet if someone joins the household **after** the client's admission to the program

1. From the AWARDS Home screen, click **CENSUS** from the left-hand menu, then click **Profile**. The Consumer / Program Profile page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the household composition is to be updated.
3. Select either Current Roster or Roster Archives
4. Click Face Sheet
5. Click the **Client** drop-down arrow and select the consumer for whom the household composition is to be entered or updated.
6. Click **CONTINUE**. The *Consumer Face Sheet* page is displayed.
7. Click Household and Child Info

8. Select the Household Composition Tab
9. Select to edit a current household member's information by clicking on the household member's name *OR* add a new household member by clicking on **Add New Household Member** and follow the steps outlined above.

First Name	Last Name	Date of Birth	SSN	Relation to Primary Client	Status	Living With Household	Start Date	End Date
Abe	Blincoln	01/01/1963	999-99-1234	Self	Active	Yes	07/01/2016	
George	Washington	01/01/2003	999-99-9999	Son	Active	Yes	07/01/2016	

Updating a Client Facesheet

All clients enrolled in CoC funded projects for 365 days or more must have an annual assessment completed. The assessment must have an effective date recorded in the HMIS Info section of the client's facesheet record within 30 days +/- the anniversary date of the client's admission into the project.

1. From the AWARDS Home screen, click Profile. The Consumer/Program Profile page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the consumer whose face sheet is to be updated.
3. If the face sheet to be updated is for a former (discharged) consumer, click the **Roster Archives** radio button.
4. Click **Face Sheet**. The *Consumer Profile / Face Sheet Update Selection* page is displayed.

5. Click the **Consumer** drop-down arrow and select the consumer for whom the face sheet is to be updated and **CONTINUE**

The *Consumer Face Sheet* page is displayed.

This page is broken into sections of like consumer information that can each be updated individually.

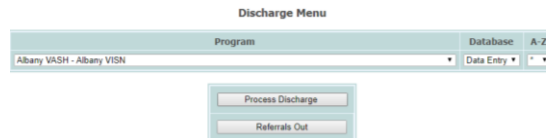
The HMIS section of the Face Sheet must be updated annually for clients that are in a CoC funded project for 365 days. This update must be done within 30 days +/- the anniversary of the client's admission date into the project

6. Update the face sheet information as necessary by configuring the fields and options in one or more of the available sections. *– Do not update any of the Special Needs information within the client's facesheet, as this will cause an error in APR reporting. Special Needs information is only updated within the client's admission record*
7. When all face sheet information has been updated as necessary, Click UPDATE

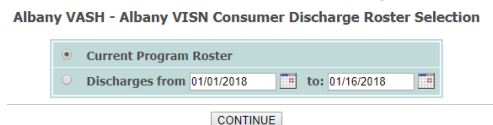
Discharges

Individual Discharge

1. From the *AWARDS Home* screen, click **Discharge**. The *Discharge Menu* page is displayed.
2. Click the **Program** drop-down arrow and select the program from which the client is to be discharged.
3. Click **Process Discharge**.



The *Client Discharge Roster Selection* page is displayed.



4. Confirm that the **Current Program Roster** radio button is selected, and then click **CONTINUE**.

The *Discharge Client Selection* page is displayed.



5. Click the **Client** drop-down arrow and select the client to be discharged.
6. Click **CONTINUE**. If the client being discharged is the only person in the household, the *Discharge Information* page for the client will display



7. Update the necessary HMIS fields
 - a. **Date** – Enter the clients discharge date
 - b. **Income, Noncash Benefits and Health Insurance**– Should be updated on the client's face sheet prior to being discharge.
NOTE: Special Needs is only updated in the client's admission record. Do NOT update Special Needs Information on the Discharge Record.
 - c. **Destination** – Click the drop-down menu to select the client's housing situation at discharge (do not select "other" as, 99.999% percent of housing situations do in fact fit into the drop-down options provided)
 - d. **New Residence County** – Click the drop-down menu to select the NYS county that the client will be residing in upon discharge (if client is moving out of state select the appropriate option)
 - e. **Discharge Note** – Enter notes in the appropriate note text boxes
8. Click **APPLY**. The client's discharge is processed and a read-only report version of the form is displayed
A discharged client is included on the current roster of a program up to and including his or her discharge date for that program. After the discharge date, he or she is moved to the program's roster archives.

Household Discharge

If the client being discharged is the primary client of a household that has other household members admitted in the program from which he or she is being discharged, a message displays stating "You are discharging the primary client of a household. The listed household members will be discharged along with this client, unless selected otherwise."

This screen allows you to select whether all household members with admission records in the selected program should be discharged with the primary client, or if they should remain on the program roster. Choose one of the following options:

Discharge household members along with the primary client – If all household members with program admissions are being discharged with the primary client, click this radio button, and then click **CONTINUE**.

ACT Services Team One
Discharge Information
Short Glass

You are discharging the primary client of a household.
The listed household members will be discharged along with this client, unless selected otherwise.

First Name	Last Name	Household Entry Date
Kid	Glass	01/02/2012
Tall	Glass	01/02/2012

View Household Composition

☒ Discharge household members along with the primary client
☐ Retain the household members, designate Tall Glass as the primary client of this household, from this point forward.

CONTINUE

Jump Back Opening Menu Help Menu Log Out

A table displays listing each household member to be discharged. **Household members must be discharged individually before the primary client is discharged.**

On this table, click the radio button next to the household member to be discharged, and then click **CONTINUE**. the *Discharge Information* page for the client will display

	First Name	Last Name	Household Entry Date	Program	Admission Date	Discharge Date
<input type="radio"/>	Kid	Glass	01/02/2012	ACT Services Team One	01/02/2012	
<input type="radio"/>	Short	Glass	01/02/2012	ACT Services Team One	01/02/2012	
<input type="radio"/>	Tall	Glass	01/02/2012	ACT Services Team One	01/02/2012	
View Household Composition						

- Update the necessary HMIS fields
 - Date** – Enter the clients discharge date
 - Income, Noncash Benefits and Health Insurance**– Should be updated on the client's face sheet prior to being discharge
 - Destination** – Click the drop-down menu to select the client's housing situation at discharge (do not select "other" as, 99.999% percent of housing situations do in fact fit into the drop-down options provided)
 - New Residence County** – Click the drop-down menu to select the NYS county that the client will be residing in upon discharge (if client is moving out of state select the appropriate option)
 - Discharge Note** – Enter notes in the appropriate note text boxes
- Click **APPLY**. The household member's discharge is processed and an updated table is displayed as described in step 1. Repeat steps 2 and 3 until all household members have been discharged. The radio button then opens for the primary client, allowing that last discharge to be processed.

The Discharge Date, Destination, and New Residence County fields will all prepopulate with the first household member's information as AWARDS "assumes" that a household being discharged at the same time will remain together

Household Discharge, Keeping Household Members

Select **Retain the household members**, designate ____ as the **primary client of this household**, from this point forward - If only the primary client is being discharged and the remaining household members are staying in the program, click this radio button.

1. The table refreshes and a drop-down option displays to select the name of the new primary client. Once the new name is selected, the **New Relation to Primary Client** column refreshes and a drop-down displays for household members who are not the new primary client. Select new relations as appropriate, and then click **CONTINUE**.

The *Discharge Information* page for the client will display

2. Update the necessary HMIS fields
 - a. **Date** – Enter the clients discharge date
 - b. **Income, Noncash Benefits, Health Insurance, and Special Needs** – Should be updated on the client's face sheet prior to being discharge
 - c. **Destination** – Click the drop-down menu to select the client's housing situation at discharge (do not select "other" as, 99.999% percent of housing situations do in fact fit into the drop-down options provided)
 - d. **New Residence County** – Click the drop-down menu to select the NYS county that the client will be residing in upon discharge (if client is moving out of state select the appropriate option)
 - e. **Discharge Note** – Enter notes in the appropriate note text boxes
3. Click **APPLY**. The client's discharge is processed and a read-only report version of the form is displayed

Updating a Discharge Record

1. From the *AWARDS Home* screen, click **Discharge**.

The *Discharge Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the discharge record is to be updated.
3. Click **Process Discharge**.

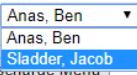
The *Client Discharge Roster Selection* page is displayed.

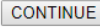
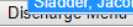
4. Click the **Discharges from** radio button.
5. Only those records for discharges taking place within the date range in the **Discharges from** and **to** fields on this page will be available for updating. Make changes to the default date range as necessary (using mm/dd/yyyy format) so that the date of the discharge you want to work with is included.
8. Click **CONTINUE**.
- 9.

The *Program Discharge Client Selection* page is displayed.

Training - CoC Permanent Housing Program Discharge Consumer Selection

Discharges from 01/01/2017 to 01/16/2018

Former Consumer: 

9. Click the **Former Client** drop-down arrow and select the consumer for whom the discharge record is to be updated.
10. Click **CONTINUE**. The discharge record is displayed on the *Discharge Information* page.
11. Make changes or additions to the information on this page as necessary.
12. Click **APPLY**. The discharge information is saved and a read-only report version of the discharge record is displayed on the *Discharge Information* page.