UPDATING THE RECORDS OF DISCHARGED CLIENTS IN AWARDS



Client records often need to be updated even after the client has been discharged from a program; possible reasons include responding to data standards changes or addressing data quality issues.

This document contains instructions to update Admission, Face Sheet, Progress Notes/Contacts Logs, and Discharge records for clients already discharged from program.

Updating a Discharged Client's: Admission

NOTE – All Admission Record fields can be updated **EXCEPT for the client's admission date**. Please submit a HelpDesk ticket to the HMIS team if this is necessary.

- 1. From the AWARDS Home page, select Intake/Admission.
- 2. The *Intake/Admission Search* page is displayed. Using the 'Program Selection' drop-down, select the Program the client was discharged from.
- 3. Type the discharged client's first and last name into the 'Search for Existing Referrals...' fields and click CONTINUE.

Search for existing referrals using identifying information:



- 4. The *Intake/Admission Search Results* page is displayed. Select the discharged client's name from the list of admission records.
- 5. Options for the admission record are displayed. Select the option to 'Edit the demographic fields of this Training - CoC Permanent Housing Intake / Admission Search Results

				Referral Source Name = C B Application St	Referral Source Type: All Sources Name = C B Application Status: <i>all undecided dispositions - all resolved outcomes</i>							
<u>Screened</u>	<u>Applicant</u>	Birthdate	<u>SSN</u>	<u>Status</u>	status Updated Program Eligibility S				<u>Forms</u> <u>Received</u>	<u>Days</u> <u>Open</u>	<u>Admission</u> <u>Date</u>	<u>Discharge</u> <u>Date</u>
?	Create New Applic			Screening	?	Training - CoC Permanent Housing						
08/29/2017	Cinna Bun	08/30/1999	379-24- 5678	Accepted- Admission	08/29/2017	Training - CoC Permanent Housing	Undetermined Eligibility	Self- Self Referral	No Date for Forms Received		08/29/2017	02/01/2018

intake record' by clicking on the circular radio button to the left and click CONTINUE.



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6. The client's admission record now opens in data-entry form mode. Update the necessary fields (excluding Admission date) and click UPDATE FORM.

mune parefriojen start pare		Client L	ocation (Continuum of Care):	
08/29/2017				
Discharged:				
02/01/2018				
nformation Sharing Level:				
eferred By:	Training - CoC Perm	anent Housing Self		Update Referral Source
ndicebes Required Fields				
ndonen Regions Fielde *First Name:		Middle Name:	*Last Name:	Suffix:
dates Repired Felts *First Name: Clima []		Middle Name;	*Last Name: Bun	Suffix:
ndate feater feater *First Name: Clima () *Name Data Quality:		Middle Name: Alias:	*Last Name: Bun *Social Security #:	Suffix: SSN Data Quality:
diales fessend Finite *First Name: [Cines		Middle Name: Alias:	*Last Name: Bun *Social Security #: 123456789	Suffix: *SSN Data Quality: Data not collected
Holden Fracter Finite Finite Finite		Middle Name: Alias: *Birthdate:	*Last Name: Bun *Social Security #: 12245/789 *Birthdate Data Quality:	Suffix: *SSH Data Quality: Data not collected (Jul 5534 reported

7. The *Household Composition* page is displayed. By default, the 'Consumer should remain in their current household' option is selected. Leave this option selected and click CONTINUE.

	Traiı	ning - CoC Pe Household Household Cinn	ermanent H Compositio ID: 24176 a Bun	lousing n D				
	Cinna Bun is currently a member of the following household.							
First Name	Last Name	Date of Birth	<u>SSN</u>	Relation to Primary Clien				
Cinna	Bun	08/30/1999	123-45-6789	Daughter				
Honey	Bun	03/21/1980	867-96-6652	Self				
 Consume Remove C 	r should rem Consumer fro	ain in their cur om current hou	rrent househo sehold and c	old reate/join a new househo				
		CON	TINUE					

8. The *Household Composition* page refreshes and asks if you want to add another member to this household. **Your updates are now saved.** Click HOME to go back to the *AWARDS Homepage*.

		Trair	ning - CoC Pe Household Household Cinn	ermanent H Compositio ID: 241760 a Bun	ousing n D						
First Na	First Name La		irst Name Last		irst Name Last		First Name Las		Date of Birth	<u>SSN</u>	Relation to Primary Client
Cinna		Bun	08/30/1999	123-45-6789	Daughter						
Honey		Bun	03/21/1980	867-96-6652	Self						
	W	ould you like	e to add anoth O Ye	er member to s No	this household?						

Updating a Discharged Client's: Face Sheet

1. From the *AWARDS Homepage*, use the 'Program Selection' drop-down to select the Program the client was discharged from. Then select 'Profile' and the 'Face Sheet' option from the flyout menu.

1 Home	Program Group	All Program Types	•	Division	All Agencies	s	•	HMIS Options	All HMIS Project Typ	e •
" Home			Program	C.	Training - Co	C Permanent Hou	ising			•
🕰 Census										
🛱 Charts	Census A	Activities								
Administration	S+ Intak	e/Admission				J- Disch	arde			
FootholdConnect		CAUTISSION				- Discha	arge			
AWARDS Certification Qualifying Exam Open Through September 4th!	🕮 Hous	sing				# Profile				
						Face Sheet View Waiting	List			

2. The *Consumer Profile / Face Sheet Update Selection* page is displayed. Click the box next to "Roster Archives" and WAIT FOR THE PAGE TO REFRESH BY ITSELF.





3. After the page refreshes, the Consumer drop-down will contain <u>only clients who have been discharged</u> from the program. Select the discharged client's name and click CONTINUE.





4. The Face Sheet page is displayed. Scroll to the HMIS Info section to complete the updates as needed by clicking on 'Update HMIS Info' to open this section for data entry OR by clicking on the pencil icon to the right of the specific update that needs to be edited. NOTE – All fields can be updated by editing an existing record EXCEPT for the Effective Date. If the Effective Date is incorrect, you must create a new update with the correct date.

		HMIS Info Update History			
HMIS Info Update History	OR	08/09/2017 Annual Undate 07/06/2016	1 1	××	<u>a</u>
None		08/01/2015 Annual Update	2	×	
Update HMIS Info					

5. Once you complete an update **OR** edit an existing update's information, click UPDATE to save the record.

Updating a Discharged Client's: Progress Notes

- 1. From the *AWARDS Home* page, use the 'Program Selection' drop-down to select the Program the client was discharged from.
- 2. Select 'Charts' from the left-side menu.

A Home	Program Group All Program Types	HMIS Options All HMIS Project 1
	Program. Training -	CoC Permanent Housing
Alla Census		
Charts	Chart Activities	
Administration	I Employment	0= Entitlemente
FootholdConnect	- Employment	- Entrements
AWARDS Certification Qualifying Exam Open Through September 4thl	6 Hospital	Incidents
	- Medical	ណ៍ Outcomes
	O Reception Desk	E Services - Group
	E Services - Individual	

3. Select 'Services Individual 'and then the 'Progress Notes' option from the flyout menu.

E Services - Individual
Assessment Data
Charting Timetable
 Contacts Log
Progress Notes
Service Coordinators
Service Plans
Service Referrals
Toxicology Information
Utilization Reports »
Forms »

4. The *Follow Up Progress Notes Data Entry* page will display. Click the box next to "Roster Archives" and WAIT FOR THE PAGE TO REFRESH BY ITSELF.





- 5. After the page refreshes, the 'Consumer' drop-down will contain <u>only clients who have been discharged</u> from the program.
- 6. Select the discharged client's name from the 'Consumer' drop-down **and** YOUR name from the 'Worker' drop-down (you can only edit notes you wrote) and click CONTINUE.

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7. The Individual Progress Notes Editing Index page is displayed. Select the radio button to the left of an existing note that you want to edit, or select the top row to add a missing note, and click CONTINUE. NOTE – Depending on how your program is set up and how long ago this client was discharged, you <u>may need to request</u> both back-dating privileges and for that program's back-dating window be expanded (the default back-dating window is 45 days.)

	Individual Progress Notes Editing Index									
	Consumer	Pi	Program			Dat	e Range	Admissi	on	
	Ben Anas	Training - CoC	Permanent	Housing	Staff Trainer Last 9999		9999 Days	999 Days 09/08/20		
		Select	Select the Note Section to Add / Edit / Remove							
Selected	Date	Start Time	End Time	No	ote Type	SVC	Dura	tion	Face2Face	
۲	99/99/99	?	?	New N	ote (Section)	?	XX:XX		?	
	09/09/2017	04:45 PM	07:15 PM	General	Chart Note*	СМ	2 Hours 30	Minutes	yes	
	09/09/2017	03:20 PM	04:30 PM	General	Chart Note*	СМ	1 Hours 10	Minutes	yes	
	09/09/2017	09:45 AM	10:00 AM	General	Chart Note*	СМ	0 Hours 15	Minutes	no	
	09/09/2017	09:00 AM	09:05 AM	General	Chart Note*	СМ	0 Hours 5	Minutes	no	
	09/08/2017	01:00 PM	02:30 PM	General	Chart Note*	СМ	1 Hours 30	Minutes	yes	
	G	ieneral Chart N	otes with ma	atching C	ontact Log Reco	ords in	dicated by [:]	k		
		С	ONTINUE	Consum	er Consumer	/iew				

8. You can now add/edit a note for the discharged client in the same way you would for a current client, and save the note by clicking SAVE NOTE.



Updating a Discharged Client's: Contact Logs

- 1. From the *AWARDS Home* page, use the 'Program Selection' drop-down to select the Program the client was discharged from.
- 2. Select 'Charts' from the left-side menu.

ALL Census		
Charts	Chart Activities	
≺ Administration		0 Entitlements
FootholdConnect		
AWARDS Certification Qualifying Exam Open Through September 4th	Hospital	Incidents
		ត៍i Outcomes
	Reception Desk	≣ Services - Group
	E Services - Individual	

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3. Select 'Services Individual 'and then the 'Contact Logs' option from the flyout menu.



4. The *Supportive Services Checklist* page will display. Click the box next to "Roster Archives" and WAIT FOR THE PAGE TO REFRESH BY ITSELF.



- 5. After the page refreshes, the 'Consumer' drop-down will contain <u>only clients who have been discharged</u> from the program.
- 6. Select the discharged client's name from the 'Consumer' drop-down **and** YOUR name from the 'Worker' drop-down (you can only edit notes you wrote) and click CONTINUE.
- 7. The Individual Supportive Services Editing Index page is displayed. Select the radio button to the left of an existing contact that you want to edit, or select the top row to add a missing contact, and click CONTINUE. NOTE Depending on how your program is set up and how long ago this client was discharged, you may need to request both back-dating privileges and for that program's back-dating window be expanded (the default back-dating window is 45 days.)

		Consumer	F	Program		Worker	Date F	lange	Admis	sion	
		Ben Anas	Training - Co	C Permanent I	Housing	Staff Trainer	Last 999	9 Days	09/08/	2017	
		1	Select the S	upportive Se	ervice Re	ord to Add /	Edit / R	emove			
Sele	cted V	Veekday	Date	Start Time	End Tim	e Durat	ion	Wor	ker	SVC	Note Attached
0	Add I	New Session	99/99/99	?	?			Staff T	rainer	?	?
•	- Thurs	<u>day</u>	09/14/2017	03:00 PM	03:15 PN	0 Hours 15	Minutes	Kelli Cla	rk	CM	Yes
	Satur	<u>day</u>	09/09/2017	04:45 PM	07:15 PN	1 2 Hours 30	Minutes	Staff Tra	ainer	CM	Yes
	Satur	<u>day</u>	09/09/2017	03:20 PM	04:30 PN	1 Hour 10	Minutes	Staff Tra	ainer	CM	Yes
	Satur	<u>day</u>	09/09/2017	09:45 AM	10:00 AM	1 0 Hours 15	Minutes	Staff Tra	ainer	CM	Yes
	Satur	<u>day</u>	09/09/2017	09:00 AM	09:05 AN	1 0 Hours 05	Minutes	Staff Tra	ainer	CM	Yes
	Eriday	1.	09/08/2017	01:00 PM	02:30 PM	1 Hour 30	Minutes	Staff Tra	ainer	СМ	Yes

Individual Supportive Services Checklist Editing Index

- CONTINUE Consumer Consumer View
- 8. You can now add a new or edit an existing contact the same way as for current clients and **save the contact by** clicking CONTINUE.



Updating a Discharged Client's: Discharge

- 1. From the *AWARDS Home* page, use the 'Program Selection' drop-down to select the Program the client was discharged from.
- 2. Select 'Discharge' and then the 'Process Discharge' option from the flyout menu.



3. The *Consumer Discharge Roster Selection* page is displayed. Select the 'Discharges From' radio button and enter the client's discharge date in **both** the "from" and "to" date fields and click CONTINUE.

Training - CoC Permanent Housing Consumer Discharge Roster Selection

	Current Program	Roster		
۲	Discharges from	2/1/18	to: 2/1/18	
		CONTIN	IUE	

4. The *Program Discharge Consumer Selection* page is displayed. Only clients with a discharge records taking place within the date range you entered will be available.



- 5. Select the client that needs to be updated from the 'Former Consumer' drop-down and click CONTINUE.
- 6. The Discharge Information page will be displayed. Update or correct the necessary information.

Training - CoC Permanent Housing Discharge Information

	Admis	SIGH: 00/29/2017 Addi	ess. 200 Henry Jo	σπισοπ δινά Αμ	C.7-D, Albany, New TOTK 1	2210
	Referr	al Source: Self Referral				
		*Discharge Date	02/01/18	Cannot Und	lo - Bed in Use	
		Reason for Discharge			•	
	_					
*Income from Any	Source:					
NO						
No	Discharge [Read only:	value is determined from incon	ne source entries.]			
Yes Client doesn't know						
Client refused Data not collected	. employment	Unemployment Insurance:			Supplemental	Security Income (SSI)
Social Security Disability Insurance (SSDI):		VA Service- Compensation:	VA Service-Connected Disability Compensation:		VA Non-Service-Connected Disabilit Pension:	
Private disability in	surance:	Worker's co	mnensation:		Temporary As	sistance for Needy
			APPL	(

8. A read-only confirmation version of the discharge record is displayed. The **discharge information is** saved.