



# 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:

| First Name | Last Name | Alias | SSN |
|------------|-----------|-------|-----|
| C          | B         |       |     |

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 Type: All Sources  
Name = C B  
Application Status: all undecided dispositions - all resolved outcomes

| Screened   | Applicant                            | Birthdate  | SSN         | Status             | Updated    | Program                          | Eligibility              | Source             | Forms Received             | Days Open | Admission Date | Discharge Date |
|------------|--------------------------------------|------------|-------------|--------------------|------------|----------------------------------|--------------------------|--------------------|----------------------------|-----------|----------------|----------------|
| ?          | <a href="#">Create New Applicant</a> |            |             | Screening          | ?          | Training - CoC Permanent Housing |                          |                    |                            |           |                |                |
| 08/29/2017 | <a href="#">Cinna Bun</a>            | 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.

Training - CoC Permanent Housing

Admission Form: **Cinna Bun**

The selected admission record has been used to admit Cinna Bun 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 Cinna Bun to this program

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

Intake Date/Project Start Date: 08/29/2017 Client Location (Continuum of Care):

Discharged: 02/01/2018

Information Sharing Level:

Referred By: Training - CoC Permanent Housing Self Update Referral Source

\* Indicates Required Fields

|  |                        |  |  |
|--|------------------------|--|--|
| *First Name: Cinna                     | Middle Name:           | *Last Name: Bun                            | Suffix:  |
| *Name Data Quality: Full name reported | Alias:                 | *Social Security #: 123456789              | *SSN Data Quality: Data not collected  |
| *Gender (HMIS): Female                 | *Birthdate: 08/30/1999 | *Birthdate Data Quality: Full DOB Reported | <input checked="" type="checkbox"/> SSN reported<br><input type="checkbox"/> Approximate or partial SSN reported<br><input type="checkbox"/> Client doesn't know<br><input type="checkbox"/> Client refused<br><small>07/02/2017, Data not collected</small> |



- 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.

Training - CoC Permanent Housing  
Household Composition  
Household ID: 241760  
Cinna Bun

Cinna Bun is currently a member of the following household.

| First Name | Last Name | Date of Birth | SSN         | Relation to Primary Client |
|------------|-----------|---------------|-------------|----------------------------|
| Cinna      | Bun       | 08/30/1999    | 123-45-6789 | Daughter                   |
| Honey      | Bun       | 03/21/1980    | 867-96-6652 | Self                       |



Consumer should remain in their current household  
 Remove Consumer from current household and create/join a new household.

CONTINUE



- 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*.



[HOME](#)
[CALENDAR](#)
[MESSAGES 3](#)
[REPORTS](#)

Training - CoC Permanent Housing  
Household Composition  
Household ID: 241760  
Cinna Bun

| First Name | Last Name | Date of Birth | SSN         | Relation to Primary Client |
|------------|-----------|---------------|-------------|----------------------------|
| Cinna      | Bun       | 08/30/1999    | 123-45-6789 | Daughter                   |
| Honey      | Bun       | 03/21/1980    | 867-96-6652 | Self                       |

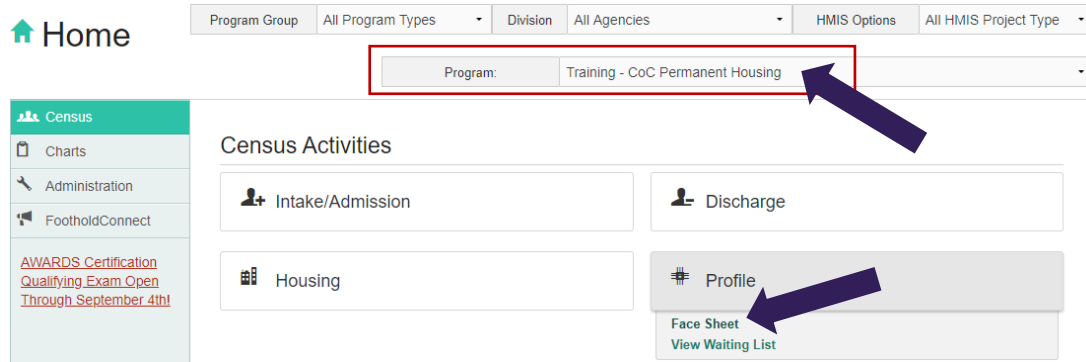
Would you like to add another member to this household?

Yes
  No

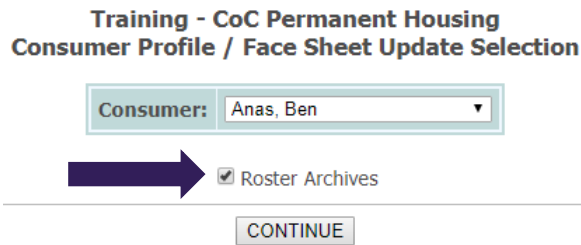
CONTINUE | FACE SHEET

## Updating a Discharged Client's: Face Sheet

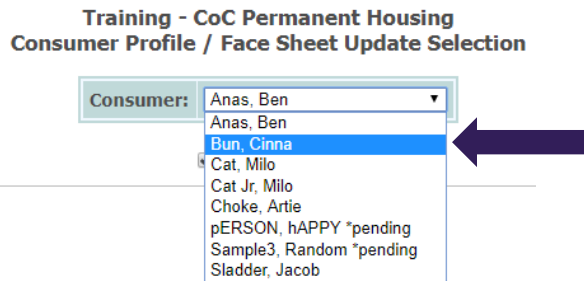
- From the *AWARDS Homepage*, use the 'Program Selection' drop-down to select the Program the client was discharged from. Then select 'Profile' and the 'Face Sheet' option from the flyout menu.



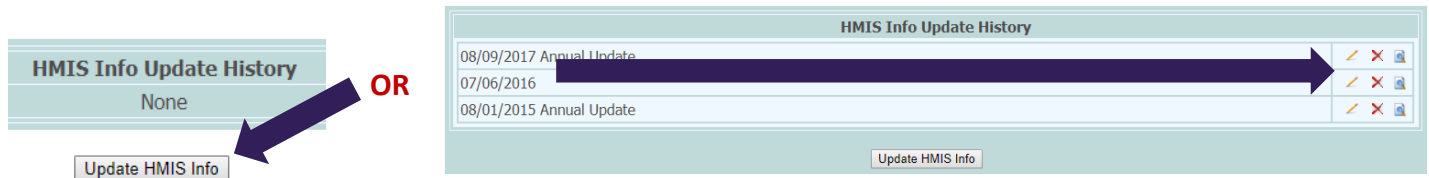
- The *Consumer Profile / Face Sheet Update Selection* page is displayed. Click the box next to "Roster Archives" and WAIT FOR THE PAGE TO REFRESH BY ITSELF.



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



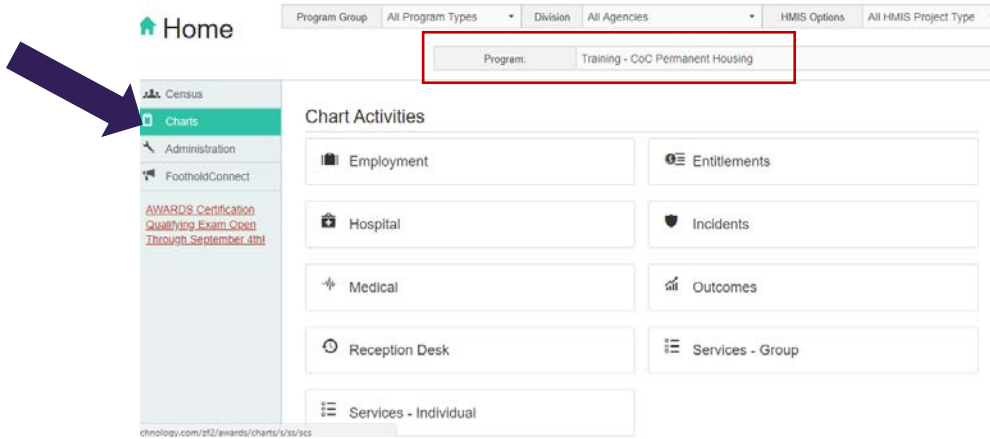
- The *Face Sheet* page is displayed. Scroll to the *HMIS Info* section to complete the updates as needed by clicking on 'Update HMIS Info' to open this section for data entry **OR** by clicking on the pencil icon to the right of the specific update that needs to be edited. NOTE – All fields can be updated 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.



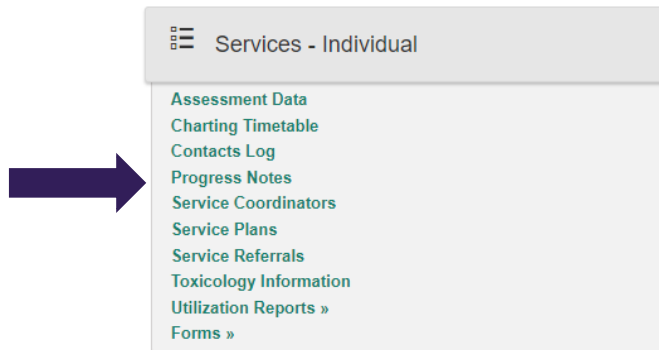
- Once you complete an update **OR** edit an existing update's information, click UPDATE to save the record.

## 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.

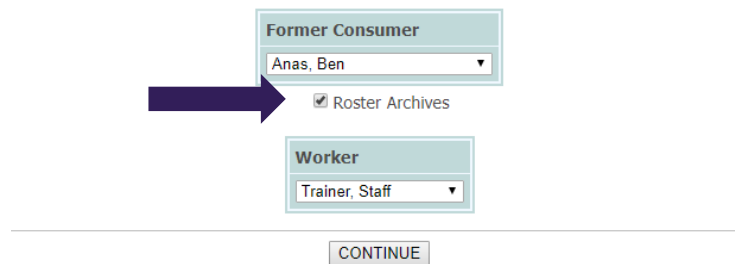


3. Select 'Services Individual' and then the 'Progress Notes' option from the flyout menu.



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.

### Training - CoC Permanent Housing Follow Up Progress Notes Data Entry



5. After the page refreshes, the 'Consumer' drop-down will contain only clients who have been discharged 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.

- 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 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.)

**Individual Progress Notes Editing Index**

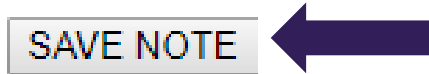
| Consumer | Program                          | Note Writer   | Date Range     | Admission  |
|----------|----------------------------------|---------------|----------------|------------|
| Ben Anas | Training - CoC Permanent Housing | Staff Trainer | Last 9999 Days | 09/08/2017 |

Select the Note Section to Add / Edit / Remove

| Selected                         | Date                       | Start Time | End Time | Note Type           | SVC | Duration           | Face2Face |
|----------------------------------|----------------------------|------------|----------|---------------------|-----|--------------------|-----------|
| <input checked="" type="radio"/> | 99/99/99                   | ?          | ?        | New Note (Section)  | ?   | XX:XX              | ?         |
| <input type="radio"/>            | <a href="#">09/09/2017</a> | 04:45 PM   | 07:15 PM | General Chart Note* | CM  | 2 Hours 30 Minutes | yes       |
| <input type="radio"/>            | 09/09/2017                 | 03:20 PM   | 04:30 PM | General Chart Note* | CM  | 1 Hours 10 Minutes | yes       |
| <input type="radio"/>            | 09/09/2017                 | 09:45 AM   | 10:00 AM | General Chart Note* | CM  | 0 Hours 15 Minutes | no        |
| <input type="radio"/>            | 09/09/2017                 | 09:00 AM   | 09:05 AM | General Chart Note* | CM  | 0 Hours 5 Minutes  | no        |
| <input type="radio"/>            | <a href="#">09/08/2017</a> | 01:00 PM   | 02:30 PM | General Chart Note* | CM  | 1 Hours 30 Minutes | yes       |

General Chart Notes with matching Contact Log Records indicated by \*

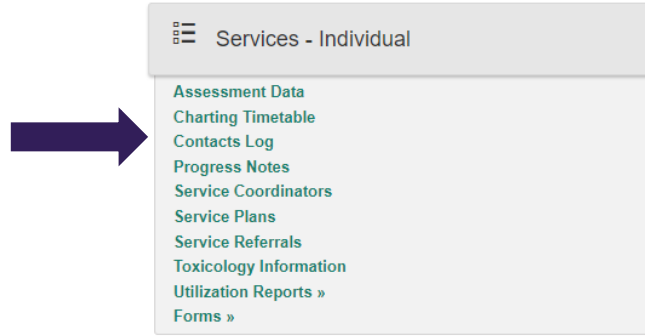
- You can now add/edit a note for the discharged client in the same way you would for a current client, and **save the note by clicking SAVE NOTE.**



## Updating a Discharged Client’s: Contact Logs

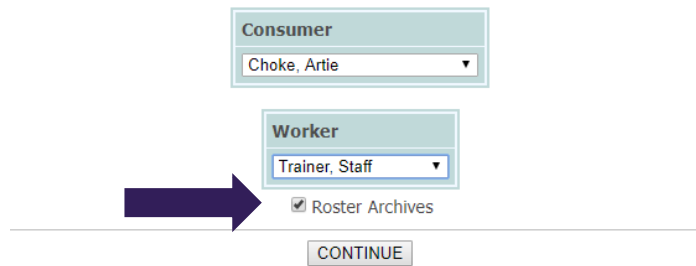
- From the *AWARDS Home* page, use the ‘Program Selection’ drop-down to select the Program the client was discharged from.
- Select ‘Charts’ from the left-side menu.

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.

**Training - CoC Permanent Housing Supportive Services Checklist**



5. After the page refreshes, the 'Consumer' drop-down will contain only clients who have been discharged 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.)

**Individual Supportive Services Checklist Editing Index**

| Consumer | Program                          | Worker        | Date Range     | Admission  |
|----------|----------------------------------|---------------|----------------|------------|
| Ben Anas | Training - CoC Permanent Housing | Staff Trainer | Last 9999 Days | 09/08/2017 |

Select the Supportive Service Record to Add / Edit / Remove

| Selected              | Weekday         | Date       | Start Time | End Time | Duration           | Worker        | SVC | Note Attached |
|-----------------------|-----------------|------------|------------|----------|--------------------|---------------|-----|---------------|
| <input type="radio"/> | Add New Session | 99/99/99   | ?          | ?        |                    | Staff Trainer | ?   | ?             |
| <input type="radio"/> | Thursday        | 09/14/2017 | 03:00 PM   | 03:15 PM | 0 Hours 15 Minutes | Kelli Clark   | CM  | Yes           |
| <input type="radio"/> | Saturday        | 09/09/2017 | 04:45 PM   | 07:15 PM | 2 Hours 30 Minutes | Staff Trainer | CM  | Yes           |
| <input type="radio"/> | Saturday        | 09/09/2017 | 03:20 PM   | 04:30 PM | 1 Hour 10 Minutes  | Staff Trainer | CM  | Yes           |
| <input type="radio"/> | Saturday        | 09/09/2017 | 09:45 AM   | 10:00 AM | 0 Hours 15 Minutes | Staff Trainer | CM  | Yes           |
| <input type="radio"/> | Saturday        | 09/09/2017 | 09:00 AM   | 09:05 AM | 0 Hours 05 Minutes | Staff Trainer | CM  | Yes           |
| <input type="radio"/> | Friday          | 09/08/2017 | 01:00 PM   | 02:30 PM | 1 Hour 30 Minutes  | Staff Trainer | CM  | Yes           |

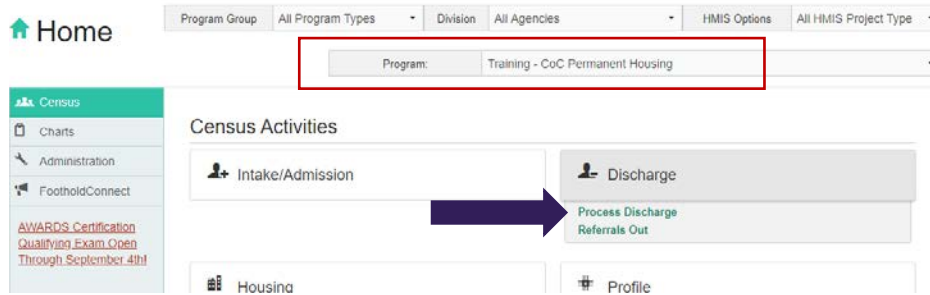
CONTINUE Consumer Consumer View

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.

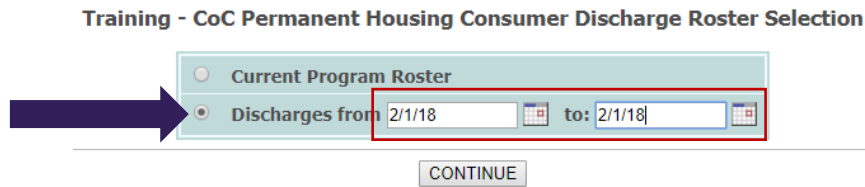
CONTINUE

## Updating a Discharged Client's: Discharge

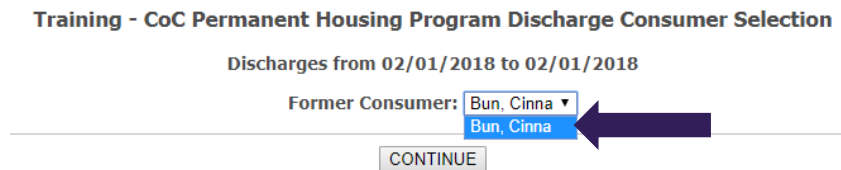
1. From the *AWARDS Home* page, use the 'Program Selection' drop-down to select the Program the client was discharged from.
2. Select 'Discharge' and then the 'Process Discharge' option from the flyout menu.



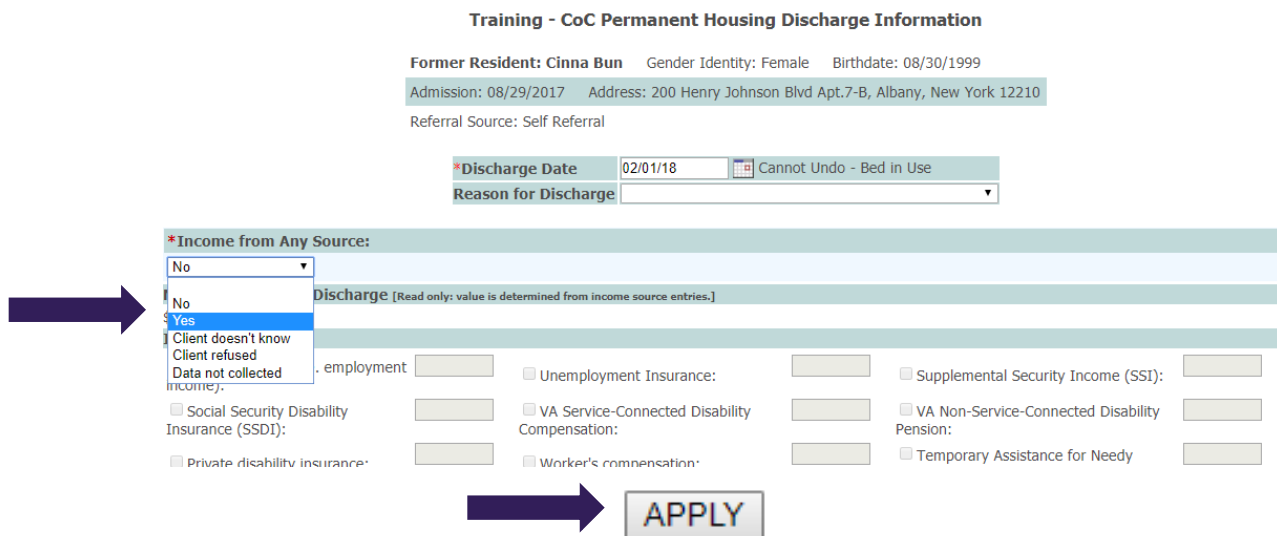
3. The *Consumer Discharge Roster Selection* page is displayed. Select the 'Discharges From' radio button and enter the client's discharge date in **both** the "from" and "to" date fields and click CONTINUE.



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.



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