HMIS USER GUIDE

Step-by-step instructions for accessing, navigating, entering and/or updating required demographic data within the CRHMIS AWARDS database.

CARES OF NY, INC.

UPDATED: OCTOBER 2018

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System Requirements

The following software and hardware specifications are required to ensure that AWARDS works correctly.

1. Software Requirements – *As of 7/26/2017*

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; if you use a browser that is not listed below, you may experience issues.

Browser	Version	Operating System
Apple Safari *Safari should not be used in "Private Browsing" mode when accessing AWARDS.*	Most Recent	Mac OS x iOS
Google Chrome	Most Recent	Windows 7, Windows 8.1, Windows 10 Mac OS X Chrome OS Linux Android iOS
Microsoft Edge	Most Recent	Windows 10
Mozilla Firefox	Most Recent	Windows 7, Windows 8.1, Windows 10 Mac OS X Chrome OS Linux Android

- *NOTE: Windows WP is not a supported operating system.*
- *NOTE: Internet Explorer is not a supported browser.*

Browser Plug-ins

Within your chosen browser:

- *JavaScript:* set to "allowed" for the AWARDS website.
- *Adobe Flash browser plug-in*: **must** be set to "allowed" for the AWARDS website, as it is **required** to use attachments in AWARDS Messages. Attachments will not work with browsers that do not support or block Flash, such as those in iOS and Android.
- *Pop-ups*: set to "allowed" for the AWARDS website within any pop-up blocker plug-in, to prevent interference with functionalities such as file downloads.

2. Hardware Requirements

Accessing AWARDS requires only a computer (with one of the browsers listed above) and an internet connection. Accordingly, AWARDS can be used with desktop computers, laptop computers, tablets, and internet-enabled smart mobile devices.

⚠ **CAUTION!** Accessing AWARDS on a mobile device can pose a serious security risk; please see the following section for details.

3. Mobile Devices

While AWARDS can be accessed and used on mobile devices, please keep in mind that AWARDS is not optimized for mobile devices; 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.

Regardless of the device you choose to use, you are responsible for making sure that the device is connected to the internet, up-to-date, and securely handles data.

⚠ **CAUTION!** Unsecured or public WIFI networks should **NEVER** be used to access AWARDS. If necessary, users should access AWARDS via a secure mobile hotspot or mobile data instead.

4. Security

All devices used to access AWARDS must follow the security guidelines described in the CRHMIS Policies & Procedures.

AWARDS Software

AWARDS was chosen by CARES due to the high level of data security provided at an affordable cost. The software was created for storage and maintenance of healthcare data, and Foothold Technology ensures that the security of their database and software is state-of-the-art. Please visit their website for further information.

User Responsibilities

Data is only protected while in the AWARDS database. It is the responsibility of each user to ensure that data remains within the AWARDS database and software as much as possible. If data must be downloaded from AWARDS, it is the responsibility of the user to securely and completely delete all information after use.

⚠ **CAUTION!** Users must **NEVER** use email to communicate client-level details. ALWAYS use AWARDS Messages.

Encryptions

While AWARDS does not require the use of an encrypted device, encryption of devices used to access AWARDS is highly recommended. Encrypted devices are protected upon device lockout by a password-protected software script that "scrambles" the device's contents so that it is indecipherable to unauthorized individuals – including anyone acting maliciously – unless they have the password to reverse the script. If the device is compromised or stolen, encryption greatly reduces the chances of unauthorized users gaining access to AWARDS or to any information downloads from AWARDS on the device that had not been deleted.

Logging In and Out of AWARDS

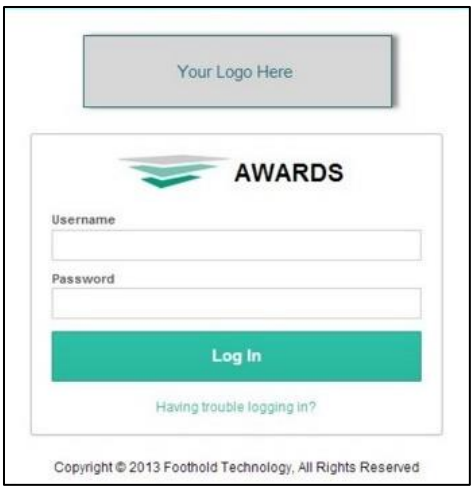
Every use of AWARDS involves (1) accessing the internet via a qualifying device and network, (2) going to the AWARDS database web application, (3) logging in, (4) working in AWARDS, and (5) logging out.

5. Logging In

Part I: Login Process

The AWARDS URL for CARES' is: https://cares.footholdtechnology.com

1. Open an Internet browser.
2. Enter **your AWARDS URL** into the browser and press **<Enter>**. *The AWARDS Login page will be displayed, as pictured right.*
3. In the fields provided, type a valid **AWARDS username** and **password.**
   - Usernames are provided to prospective users by a CARES HMIS Team member upon completion of the New User Training Series.
   - For initial login, the default password of cares1234 will be used.
4. Click **Log In** or press **<Enter>**. The AWARDS Home screen will be displayed.
5. If this is your first time accessing AWARDS, or accessing AWARDS after a password reset, proceed to Part II.



Part II: For First-Time Users & Reset Accounts

Upon logging in to AWARDS for the first time, or logging in after a password reset by a CARES HMIS team member (any time you log in using **cares1234** as your password), you must:

6. Follow the prompts to **change your password**.
7. **Log out, then log in again** with your new password.
8. Complete the Password Reset Functionality steps (on the following page) NOW.

6. Logging Out

Users must always log out of AWARDS when they are finished, to close the session and ensure that no one else can access AWARDS without logging in themselves.

1. Click the **Username** drop-down from the navigation bar and select **Log Out**.
2. Close all browser windows.

7. Re-Authenticating a Login

During an AWARDS session, it may be necessary for a user to ***re-authenticate*** **(log in again)** to AWARDS without having clicked to log out. AWARDS will automatically log out any user that has been inactive in the application for fifteen minutes or more, as a security measure to prevent unauthorized access to the database.

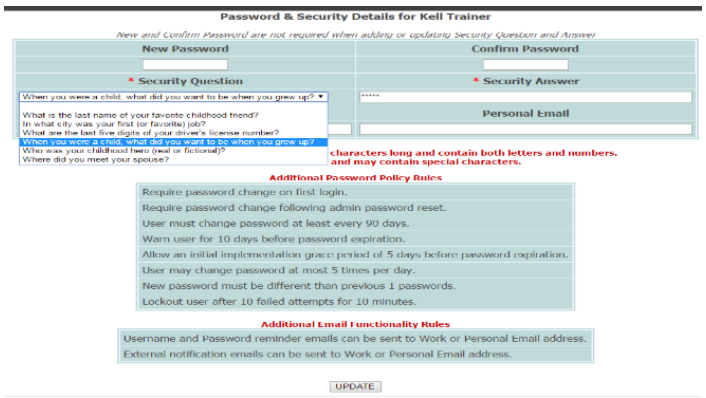
To re-authenticate, a user simply needs to **re-enter their username and password** and then they will be returned to their previous page.

8. Password Reset/Recover Functionality

AWARDS has a built-in Password Reset functionality that enables any AWARDS user to quickly and easily regain access to the system in the case of a forgotten username and/or password. Enabling it requires only a short, one-time form to be filled out with security details.

Set Your Security Details

1. After logging in to AWARDS, click the **Username drop-down** from the navigation bar.
2. Click **Password & Security**. *The Password & Security Details page will be displayed, as below*.



3. Record your **security details**:
   - Select a Security Question from the selection menu.
   - Type in your answer to the question in the Security Question field.
   - Enter your work email address in the corresponding field.
4. Click **UPDATE** to save.

Recover Your Username or Password

If you previously enabled the Password Reset functionality, you can use those handy "Forgot?" links on the AWARDS login page if you forgot your username or password and avoid a password reset.

1. From the AWARDS login page, click on one of the **"Forgot?"** links.
2. You will be prompted to enter a combination of **info from your Password & Security detail**s for AWARDS to use to confirm your identity.
3. Depending on the link you used, you will be sent an email with your username or an email with a way to reset your AWARDS password.
4. If you get stuck at any point in the process, click the **"Having trouble logging in?"** link for assistance.

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

CARES HMIS Password Reset

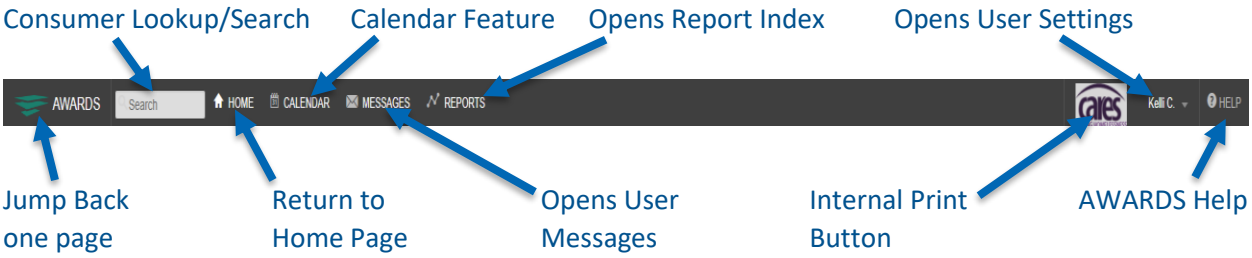
If you did not have the Password Reset functionality enabled, you must contact your CARES Customer Service Representative. Account recovery should be achieved by the next business day; however, it may take up to 24 hours therein.

✎ *NOTE: The default password of cares1234 will be used any time a user's password must be reset by a CARES HMIS team member.*

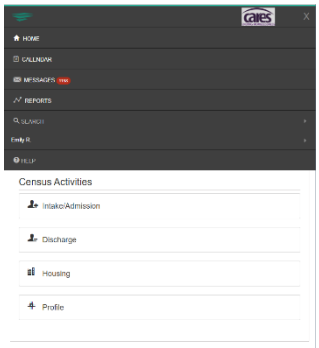
AWARDS Structure

9. Top Navigation Bar

The **top navigation bar** offers access to certain functions across AWARDS, *seen full-size in the diagram below*.



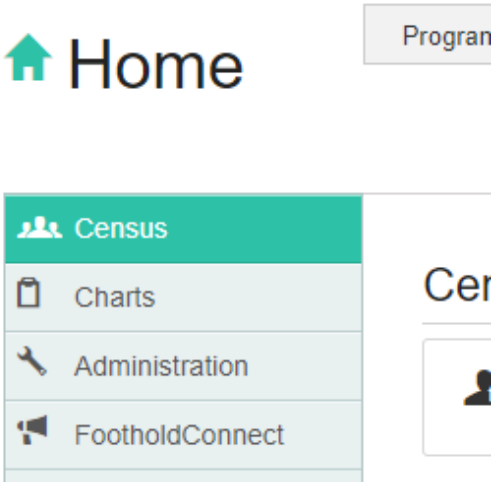
This bar will change in response to your screen resolution; i.e., smaller displays will show a smaller and more condensed navigation bar, *seen as the tablet version below left and the mobile version at right*.



10. Left-Side Menu

The AWARDS application is broken down into a variety of "modules", each of which is comprised of several related features used to perform various data entry and reporting tasks.

These modules are grouped into three categories – **Census, Chart Records, and Administration** – each represented on the Home screen's left-hand menu (*see below left*). Clicking on a category will display the modules in that category to the right of the left-side menu bar.



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.

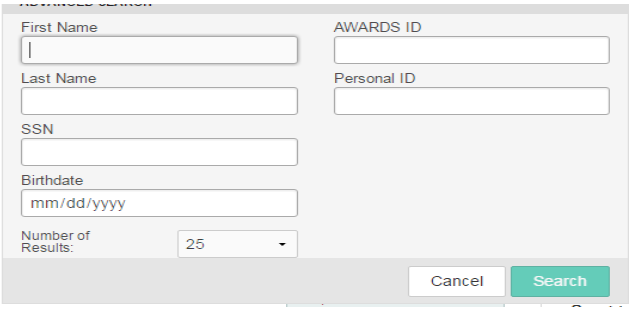
The fourth option available at the bottom of the left-hand menu will open the FootholdConnect announcement center screen overlay.

11. Consumer Lookup/Search

1. Click in the **Search** box to open the Consumer Lookup options (*see right*).

NOTE: On smaller screen sizes, the Search box will be the icon.

2. Enter any combination of **search criteria** (first and last name, SSN, DOB, etc.)
3. Click the green '**Search**' button. The Consumer Lookup Results page will be displayed, as below.



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
	415a25-67b7-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

Intake / Admission Menu

Merge Duplicate Consumer Records

4. Clients in programs that the user has chart access to will display as a blue, underlined text link.
   - Users can click this link to view the **client's program history**, including: Entitlements, Employment, Hospitalization, Face Sheet, Progress Notes, Service Plans, Timetable, and Contacts Log.
5. Clients in programs that the user does not have chart access to (programs in a different agency that have agreed to data-sharing) will appear, but only as grey, inactive text.

Help Desk

12. When to Submit a Ticket

The Help Desk should be contacted when there is an error or problem with the AWARDS database, or if you do not have permission to complete a necessary task.

The Help Desk is not for questions regarding how to use AWARDS; please refer to training materials and AWARDS Online Help instead.

Specific examples include:

1. Requests to delete a client from a program (*include all household members, if any, with the ticket).
   - This request often occurs after admitting a client into the wrong program; clone the client into the correct program, and then send in a Help Desk ticket asking for the mistaken client record to be deleted.
2. Requests for bed changes.
3. AWARDS is displaying information you know is not accurate (e.g., the same client's data appears differently when opened in an admission record vs in the face sheet).
4. Any question or issue that requires a specific client's information to be shared.

⚠ **CAUTION!** Sending client-level information through regular email is **strictly prohibited**. AWARDS Messages via a Help Desk ticket is the ONLY time or place you may include client-level information in a communication without breaching confidentiality.

13. How to Submit a Ticket

✎ *Before submitting any ticket, search in AWARDS Online Help for answers.*

If you need to submit a problem/question to the 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 will be displayed, as below.*

This page can also be opened from the Messages module directly, via the "Help Desk" link on the left-hand side of the page (life preserver icon, seen right).

2. In the "**Subject"** field, type a brief description of the problem/question.
3. In the "**Problem/Question Details**" portion of the form, complete all fields possible.
   - **Description** - Type a detailed description of your problem/question. List **your actions** up to the problem's occurrence, including all options or selections made. Include the text of any **error messages** received.

✎ *NOTE: You may use client-level information here without breaching confidentiality.*

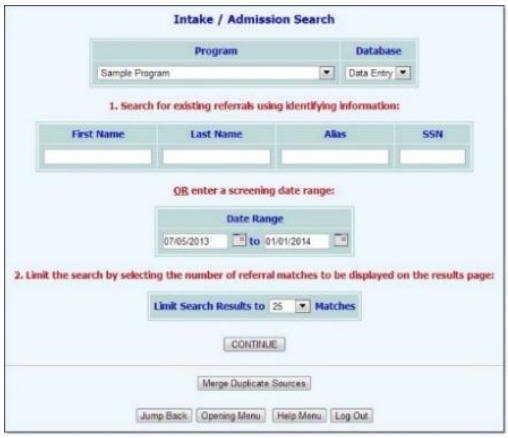
✎ *NOTE: The more information you provide, the quicker we can assist you.*

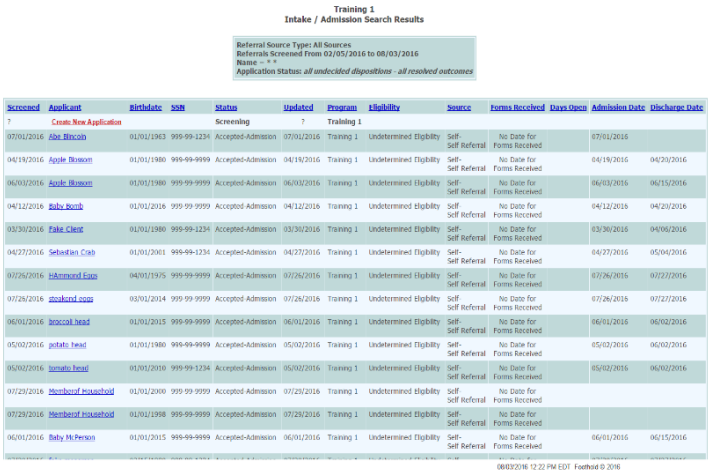
4. In the "**Attachments**" portion of the form, please attach **screen shots or files** related to your problem or question, if available.
5. After completing as much of the form as possible, click **SEND MESSAGE** and then periodically **check your AWARDS Messages inbox** for a response.
    - If you are an end user, the message is sent to all members of your agency's/continuum's local Help Desk team (the names listed above the 'Subject' field on the form).
    - Any of these individuals may review your submission and respond to you.
6. When a response is received, **review it carefully**. Any of the following may be included within the response:
    - It **may contain a request to supply additional details,** if the Help Desk was unable to find a solution with the amount of information provided. Your issue cannot be resolved until you reply.
    - A confirmation of your request being completed, and any details necessary for correct data entry in the future.
    - Step-by-step Instructions on how to resolve the issue you were experiencing.

Admissions

14. Processing a First-Time Admission

1. From the AWARDS Home screen, click **Intake/Admission**. *The Intake Records Search page will be displayed, as right.*
2. Click the **Program** drop-down arrow and select the program associated with the consumer to be admitted, and in the **First Name**, **Last Name**, and/or **Alias** fields type the consumer's name, initials, and/or alias.
3. Click **CONTINUE**. *The Intake/Admissions Search Results page will be displayed, as below.*





This page contains a list of any existing intake records that have matching identifying information to what was entered in the Intake Records Search.

4. From the "Applicant" column, click **Create New Application**. *The Admission Form page will be displayed.*

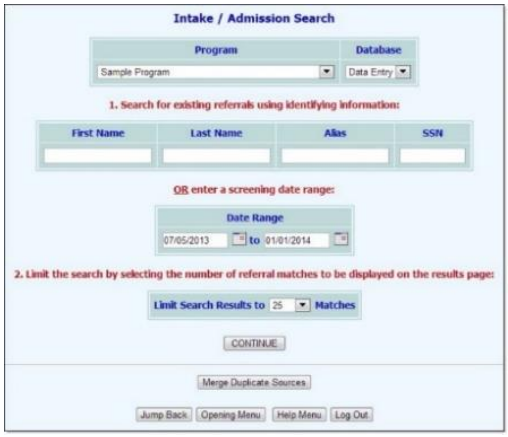
✎ *NOTE: The information a program collects is dependent upon its funding source; accordingly, the fields and options that appear on the admission form will often differ between programs.*

1. Complete the admission form by configuring the fields and options on this page as necessary.
   - RESIDENTIAL PROGRAMS ONLY: Residential programs that are set to collect household information contain a **Residence drop-down list** that is separated into two sections:
     - Vacant Units: The beds belong to apartments/units where all beds are listed as vacant.
     - Occupied Units: The beds belong to apartments/units where at least one bed is already occupied.

✎ *NOTE: Selecting a bed listed under Occupied Units places the client in a unit with roommates, which may be other household members.*

2. Click **HOUSING ADMISSION** / **PROCESS ADMISSION** (the label for this button is determined by the program type, residential or non-residential, respectively).
   - 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. Make the corrections and try again.
3. If all information is accepted, *the Household Composition page will be displayed.* At this point, the consumer's admission form is saved, and they have been admitted to the selected program**.** **Continue** to VII: Household Composition.

15. Processing a Readmission



1. From the AWARDS Home screen, click **Intake/Admission**. *The Intake Records Search page will be displayed, as right.*
2. Click the **Program** drop-down arrow and select the program associated with the consumer who is being readmitted.
3. 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** . Only referrals with screening dates in the range entered here are included in the search results.
4. Click **CONTINUE**. *The Intake/Admissions Search Results page will be displayed.*
5. From the "**Applicant**" column, click the **name of the consumer being re-admitted**. *The Admission Form Options page will be displayed, as below.*

6. Click the **radio button** to the left of "Create a new intake record and re-admit _____ to this program" to select this option.
7. Click **CONTINUE.** *The Admission Form will be displayed, prepopulated with data from the client's most recent admission.*
8. Enter/update the admission form with current data.

⚠ **CAUTION!** PLEASE be mindful to update the **Living Situation** section of the admission form. Otherwise, AWARDS will not update the number of times a person has been homeless – a number used to determine **chronic homeless** status.

9. Click **HOUSING ADMISSION** / **PROCESS ADMISSION** (the label for this button is determined by the program type, residential or non-residential, respectively).
   - 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. Make the corrections and try again.
10. If all information is accepted, *the Household Composition page will be displayed.* At this point, the consumer's admission form is saved, and they have been admitted to the selected program**.** **Continue** to VII: Household Composition.

Household Composition

The *Household Composition* page will be displayed differently depending on if the newly-admitted client is already a member of a household in the agency or not.

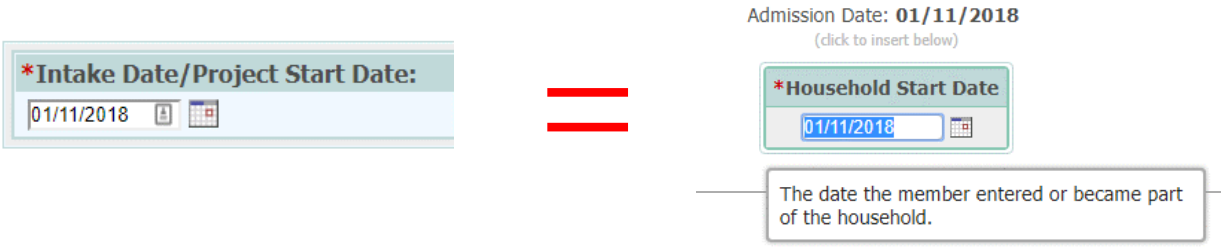
16. Client is NOT Currently in a Household

If the client is not in a household, the page will appear as left.

Create a New Household

1. If the client should be placed in a <u>new</u> household, select **Create a new Household**.
   - This option creates a new household in AWARDS and places the client into this new household as the primary client.
2. In the **Household Start Date** field, type the date on which the client became associated with the household, or click the grey text "(click to insert below)" to have AWARDS insert the admission date into the Household Start Date field for you.

⚠ **<u>This date MUST be the SAME DATE as the consumers Project Start/Admission Date ↓↓</u>**



Join to Existing Household

3. If the client is not in a household and should be placed in an <u>existing</u> household, select **Join an existing Household**.
4. <u>AWARDS will automatically refresh</u> and prompt users to search for the client record of a household member in the existing household (*see right*).
   - In the **First Name, Last Name,** and **SSN** fields, type identifying information for a household member in the existing household the client is being added to.

✎ *NOTE: If the client you are searching for has been a client of the agency in the past, less data is required (e.g., only the first two letters of the first and last names).*

5. Click **CONTINUE**. *The Household Search Results page will be displayed, as below.*

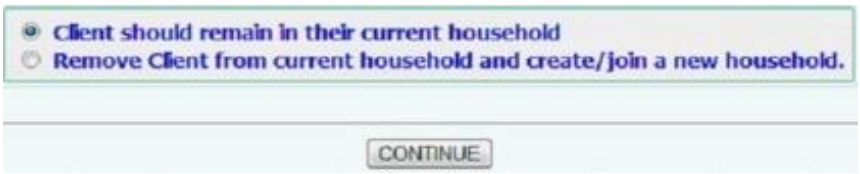
This page contains a list of clients with records in the system for whom the identifying information entered on the previous page is a match.

6. Beneath the table of search results, in the **Living With Household** portion of the page, leave the "**Yes**" radio button selected by default.

✎. *if the household member being added <u>does not actually reside with the primary client</u> and you wish to capture that detail, click the **"No" radio button**.*

7. Click the **Relation to Primary Client** drop-down arrow and select the option that describes the relationship of the new household member to the household's primary client.
8. In the **Start Date** field, type the date that the new household member became a member of the household. Click **CONTINUE.** <u>The client will be added to the household.</u>

17. Client IS Currently in a Household



If the client is already in a household, the page will appear as left.

Remain in Existing Household

1. To confirm the client's placement in that household, select **Client should remain in their current household.** Click **CONTINUE.**

Create a New Household

1. If the <u>client is no longer part of the current household</u> and should be placed in a different household, select **Remove Client from current household and create/join a new household**. Click **CONTINUE**. *An updated Household Composition page will be displayed.*
2. The client is now removed from the household and you will be asked to **create a new household or have the client join an existing** one (*see instructions on previous page*).

18. Add Members to a Household: 2 Options

After completing the steps to place the primary client in a household, users can admit/add additional household members to that household.

Option 1: Add to the Household at Admission/Intake

Complete the following steps if you are adding to the household immediately after having placed the primary client in the household.

1. From the Household Composition page, select **Yes** to add another member to the household and click **CONTINUE.**
2. AWARDS will automatically refresh and prompt users to search for the client record of the household member being added *(see right)*.
   - In the **First Name**, **Last Name**, and **SSN** fields, type identifying information for the household member being added.

✎ *NOTE: If the client you are searching for has been a client of the agency in the past, less data is required (e.g. only the first two letters of the first and last names).*

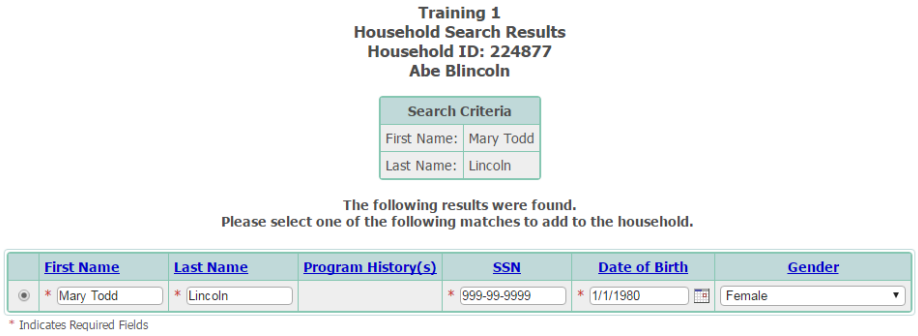
3. Click **CONTINUE**. *The Household Search Results page will be displayed, as below*.

4. Review the search results:
   - If the household member being added appears on the list of matches**, click the radio button** to the left of that household member's name and **skip to Step 8**.
   - If the household member being added does not appear on the list of matches, **continue to Step 5.**
   - If the client appears with a **red icon** next to their name (*see right*) it means they already belong to a household within the agency. See the **section after Option 2** for help on how to fix this issue.

5. For a new client, click the **New Record radio button** in the last row of the search results.

6. AWARDS will automatically refresh, and data entry fields will appear for completion (*see below*).

✎ *NOTE: The First Name, Last Name, and SSN fields will be pre-populated with any search criteria entered on the previous page.*



7. Fill in the fields as follows:
   - **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 on the right of the field.
   - **Gender -** Click the drop-down arrow and select the gender of the new household member.
   - **Living With Household** - Leave the "**Yes**" radio button selected by default, *as right*.

✎ *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**.*

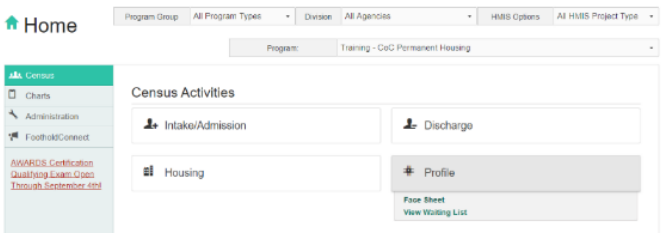
   - **Relation to Primary Client -** Click the drop-down arrow and select the option that describes the relationship of the new household member to the household's primary client.
   - **Start Date** field, type the date that the new household member became a member of the household.

8. Click **CONTINUE.** *A pop-up message will be displayed*.
9. The pop-up asks if the household member should be admitted:
   - Click **Yes,** and a *pre-populated admission form will be displayed for the selected program*. **Use this form** to admit the household member into the program and complete the process.
   - Click **No,** and you *will be returned to the starting page.*
10. To add another household member to the household, select **Add New Household Member** and complete the above steps again.
    - If no further household members should be added to the household, select **No** and click **HOME** to navigate away from this screen.

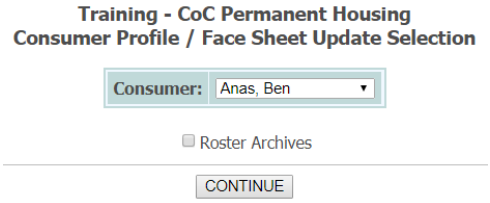
Option 2: Adding to the Household After Admission

Complete the following steps to add members to the household after the primary client's admission to the program.

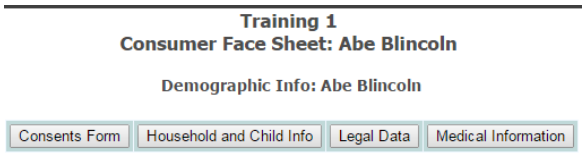
1. From the AWARDS Home screen (*see right*), click the **Program** drop-down arrow and select the program associated with the primary client of the household to be updated/added to.
2. Under **Census**, click **Profile** and select **Face Sheet** from the fly-out menu (*see right*).



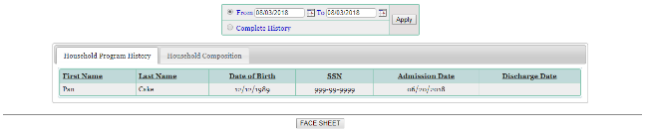
The Consumer Profile / Face Sheet Update Selection page will be displayed, as below.



3. If the primary client of the household to be added to is a former (discharged) consumer click the **Roster Archives check box**; otherwise, **continue**.
4. Click the **Consumer** drop-down arrow and select name of the primary client of the household to be updated/ added to. Click **CONTINUE**. *The Consumer Face Sheet page is displayed, as below.*



5. Click **Household and Child Info**. *The Household Composition/information page will be displayed, as right.*



6. Select the **Household Composition Tab** to view household members, then click **Add New Household Member** (*see below*)**.**

From this location you can also click on a household member's name to edit their information.

7. Follow the steps from **'Adding a Household Member: Option 1'** above to finish adding a new household member.

19. Add Members to a Household

If a client is already a member of a household

AWARDS will only allow a client to be active in one household at a time. Clients already in a household will appear with a red warning icon next to their name (*as below*).

8. To see the details of the household to which the client belongs, click the red icon next to the client's name. *The Household Composition page for that household will be displayed in a pop-up window over the search results page.*
9. Within that pop-up, you can **Edit Household Composition** of that household (e.g., to remove the client to be able to place them in the target household), or **Close**.

Client Face Sheet

20. IMPORTANT NOTICES

Income Updates

⚠ **CAUTION!** Updates to **client income** information **MUST** be completed within the **HMIS Info section** of the face sheet, **regardless** of the other sections where the information may be shown. Income data recorded in other sections (e.g., entitlements) will not be included in APR reporting.

See the following pages for more instructions.

Special Needs Information

⚠ **CAUTION!** **Do not update** any of the Special Needs information within the client's face sheet. This will cause an error in APR reporting. Special Needs information is only updated within the client's admission record.

Annual Assessments

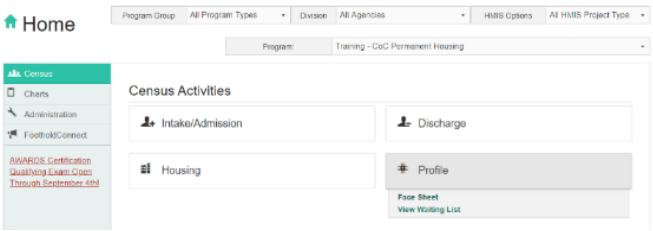
⚠ **CAUTION!** **All clients** and household members enrolled in CoC-funded projects for 365 days or more **must** have an **annual assessment** completed**.**

See the following pages for more instructions.

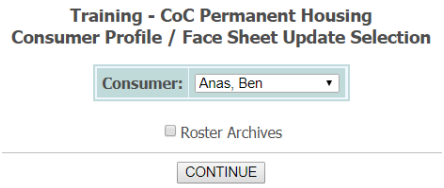
21. Updating a Client's Face Sheet

Complete the following steps to locate and update a client's Face Sheet record.

1. From the AWARDS Home screen (*see right*), click the **Program** drop-down arrow and select the program associated with the client to be updated.
2. Under **Census**, click **Profile** and select **Face Sheet** from the fly-out menu (*see right*).

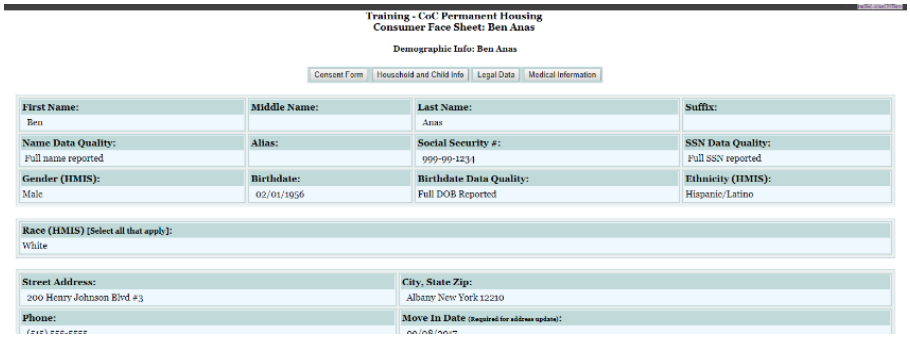


The Consumer Profile / Face Sheet Update Selection page will be displayed, as below.



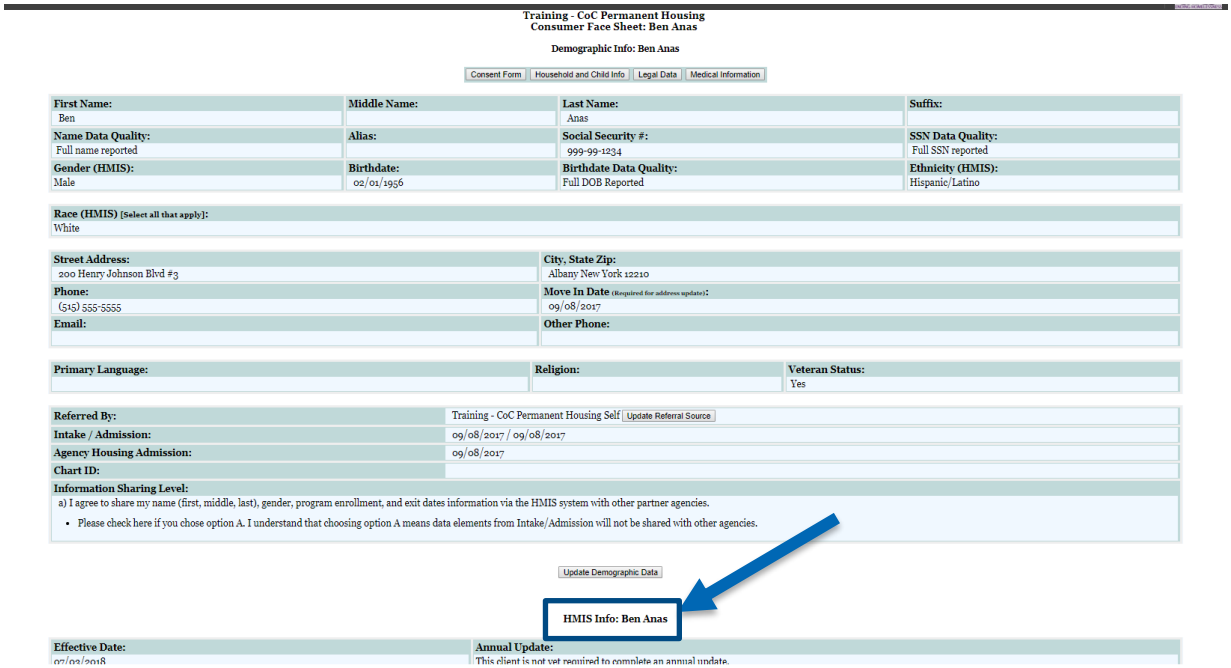
3. If the face sheet to be updated is a former (discharged) consumer click to check the **Roster Archives check box**; otherwise, leave it unchecked. Click **CONTINUE**.

4. Click the **Consumer drop-down arrow** and select the consumer for whom the face sheet is to be updated. Click **CONTINUE.** *The Consumer Face Sheet page will be displayed, as below.*



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

5. **Scroll** past the Demographics Info section to the **HMIS Info section** (*see below; location noted by the arrow/box.*) Click **Update HMIS Info** at the bottom of this second section.



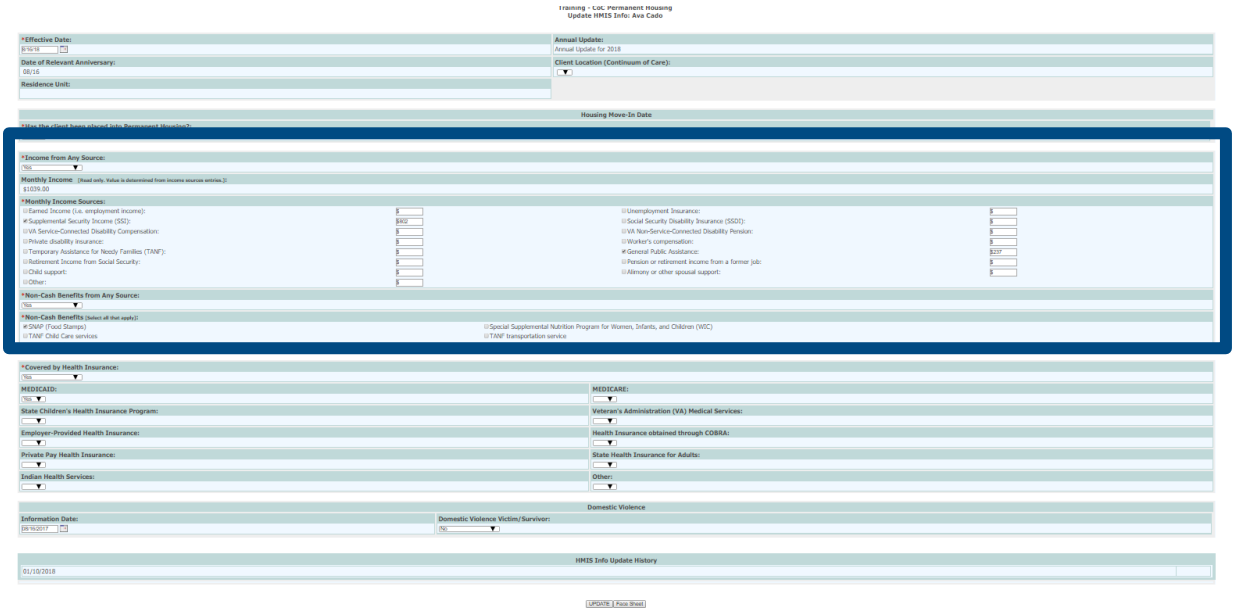
6. **Update the face sheet information** as necessary by configuring the fields and options in one or more of the available sections.
7. When all face sheet information has been updated as necessary, click **UPDATE.**

⚠ **CAUTION**! Special Needs is only updated in the client's admission record. Do NOT update Special Needs Information on the Discharge Record.

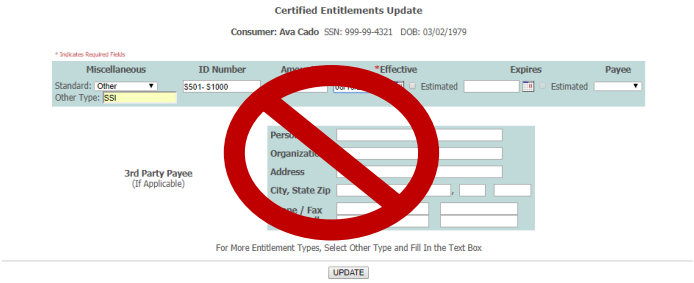
22. Update Income Information via the Face Sheet

Updates to client income information MUST be completed within the HMIS Info section of the face sheet, regardless of the other sections where the information may be shown. Income data recorded in other sections (e.g., entitlements) will not be included in APR reporting.

UPDATE INFORMATION AS AN HMIS INFO UPDATE (*AS BELOW*)



DO NOT UPDATE "ENTITILEMENTS" ANYWHERE ELSE

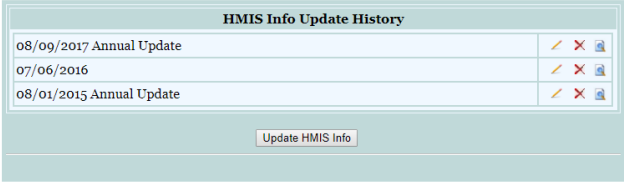


23. Updates as the Annual Assessment

All clients and household members enrolled in CoC-funded projects for 365 days or more must have an annual assessment completed.

- All members of a household must have an assessment occurring within 30 days before or after the anniversary date of the **head of household's** admission into the project.
- It does NOT matter when the additional household members were admitted – HUD requires ALL annual assessments to be completed **relative to the head of household's** anniversary date.
- The assessment must have an **effective date** recorded in the **HMIS Info section** of the Face Sheet record.

When an HMIS Info update has an effective date that occurs within the required period, AWARDS will automatically assign it as the Annual Update (*see right).*



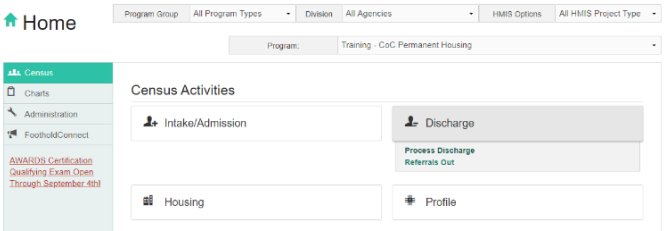
Discharges

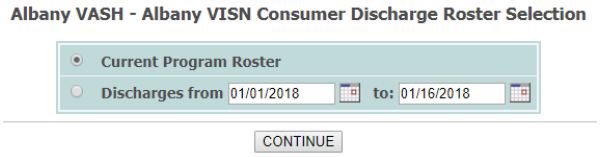
✎ *NOTE: A discharged client is included on the current roster of a program up to and including his or her discharge date for that program. After the discharge date, he or she is moved to the program's roster archives.*

24. Individual Discharge

Complete the following steps if the client to be discharged is the only person in their household.

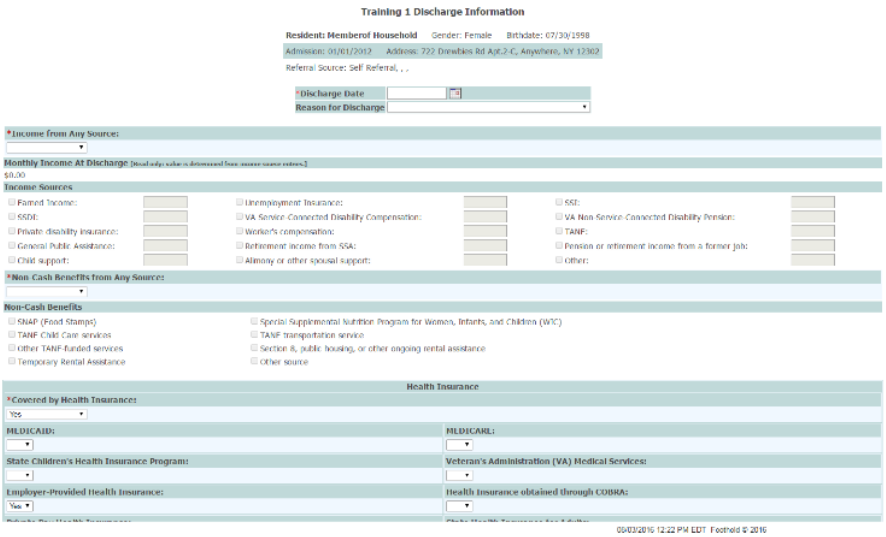
1. From the AWARDS Home screen, click the **Program** drop-down arrow and select the program associated with the client being discharged.
2. Under **Census**, click **Discharge** and select **Process Discharge** from the fly-out menu (*see right*).
   The Consumer Discharge Roster Selection page will be displayed, as below.





3. Confirm that the **Current Program Roster** radio button is selected. Click **CONTINUE**.
   The Discharge Consumer Selection page will be displayed, as below.

4. Click the **Consumers** drop-down arrow and select the client to be discharged. Click **CONTINUE**.
   The Discharge Information page for the client will be displayed, as below.



5. **Update** the necessary HMIS fields:
   - **Date** – Enter the clients' discharge date.
   - **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
   - **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 the client is moving out of state select the appropriate option).
   - **Discharge Note** – Enter notes in the appropriate note text boxes.

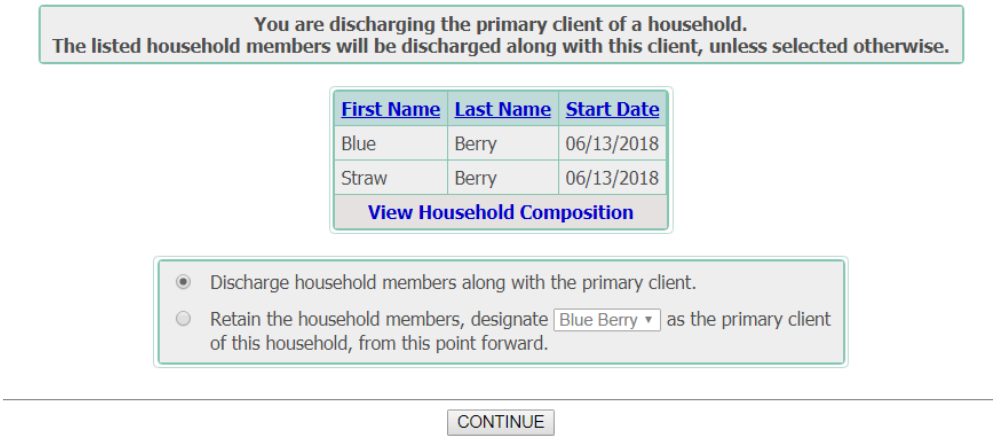
⚠ **CAUTION**! Special Needs is only updated in the client's admission record. Do NOT update Special Needs Information on the Discharge Record.

6. Click **APPLY**. The client's **discharge is processed** and *a read-only version of the form will be displayed.*

25. Discharge the Primary Client in a Household

Follow the instructions below if the client to be discharged is the primary client of a household that has other household members currently admitted in the program from which he or she is being discharged.

1. **Follow** the instructions from the **Individual Discharge section above, steps 1-4.** After selecting the client in step 4, *the Discharge Information page will be displayed as below*.



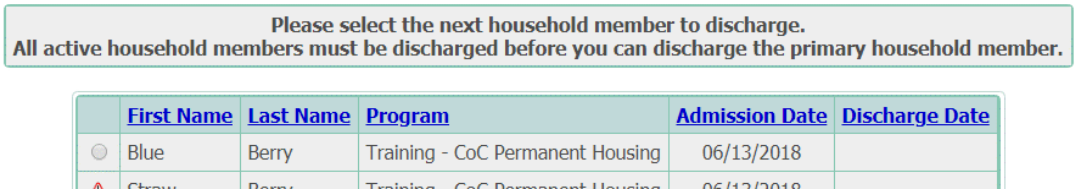
The message at the top of the page states "You are discharging the primary client of a household. The listed household members will be discharged along with this client, unless selected otherwise."

2. **Select one of the options from below the Household Members table** – then follow the instructions for one of the options on the following pages according to your needs.

Option 1: Discharge All Household Members

To discharge an entire household along with a primary client (head of household), each other household member must be discharged individually before the primary client can be discharged.

1. If all household members with program admissions are being discharged with the primary client, click the **Discharge household members along with the primary client** radio button. Click **CONTINUE**. *A table listing all household members will be displayed, as below.*

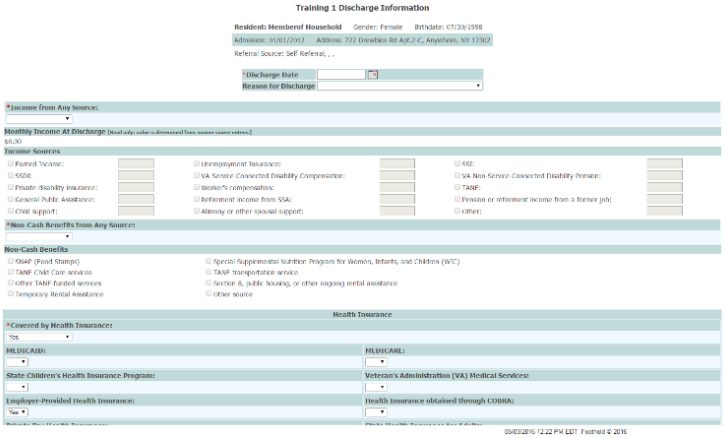


Please select the next household member to discharge.
All active household members must be discharged before you can discharge the primary household member.

	First Name	Last Name	Program	Admission Date	Discharge Date
○	Blue	Berry	Training - CoC Permanent Housing	06/13/2018	

✎ *NOTE: The primary client will appear with a red icon in place of a radio button, preventing their selection. This is because all other household members must be discharged individually before the primary client can be discharged – at that point, the red icon will revert to the radio button.*

2. Click the **radio button** next to the household member to be discharged first and click **CONTINUE**. *The Discharge Information page for the client will be displayed, as below.*



Training 1 Discharge Information

Resident: Memberof Household Gender: Female Birthdate: 07/30/1998
Admission: 01/01/2012 Address: 722 Driveline Rd Apt.2-C, Anywhere, NY 12302
Referral Source: Self Referral, , ,

*Discharge Date
Reason for Discharge

*Income from Any Source:
Monthly Income At Discharge [Read only; value is determined from income source entries.]
$0.00
Income Sources
Earned Income: | Unemployment Insurance: | SSI:
SSDI: | VA Service-Connected Disability Compensation: | VA Non-Service-Connected Disability Pension:
Private disability insurance: | Worker's compensation: | TANF:
General Public Assistance: | Retirement income from SSA: | Pension or retirement income from a former job:
Child support: | Alimony or other spousal support: | Other:

*Non-Cash Benefits from Any Source:
Non-Cash Benefits
SNAP (Food Stamps) | Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
TANF Child Care services | TANF transportation service
Other TANF-funded services | Section 8, public housing, or other ongoing rental assistance
Temporary Rental Assistance | Other source

Health Insurance
*Covered by Health Insurance:
Yes
MEDICAID: | MEDICARE:
State Children's Health Insurance Program: | Veteran's Administration (VA) Medical Services:
Employer-Provided Health Insurance: | Health Insurance obtained through COBRA:
Yes

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3. **Update** the necessary HMIS fields:
   - **Date** – Enter the client's discharge date.
   - **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
   - **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 the client is moving out of state, select the appropriate option).
   - **Discharge Note** – Enter notes in the appropriate note text boxes.
4. Click **APPLY**. The household member's discharge is processed**,** and *an updated household member table will be displayed.*
5. **Repeat steps 2-4** until all household members have been discharged.

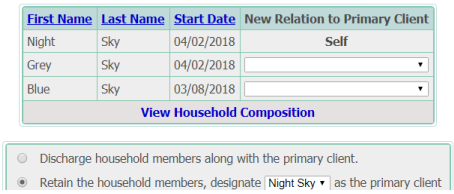
✎ *NOTE: After the first household member is discharged, some data fields will be prepopulated in the discharge form for other household members; this is because AWARDS "assumes" that a household being discharged at the same time will remain together.*

6. The **radio button** then opens for the primary client, allowing that last discharge to be processed.

Option 2: Keep Other Household Members

To discharge only the primary client (head of household), another member of the household must first be designated as the primary client/head of household.

1. If only the primary client is being discharged and the remaining household members are staying in the program, click the **Retain the household members, designate ____ as the primary client of this household**, **from this point forward** radio button.
2. AWARDS will automatically refresh the page, and the **designate ____** drop-down option will be activated. **Select the new primary client/head of household**.
3. AWARDS will automatically refresh the page again, and the **New Relation to Primary Client** column will display 'Self" for the new primary client (*see below*).



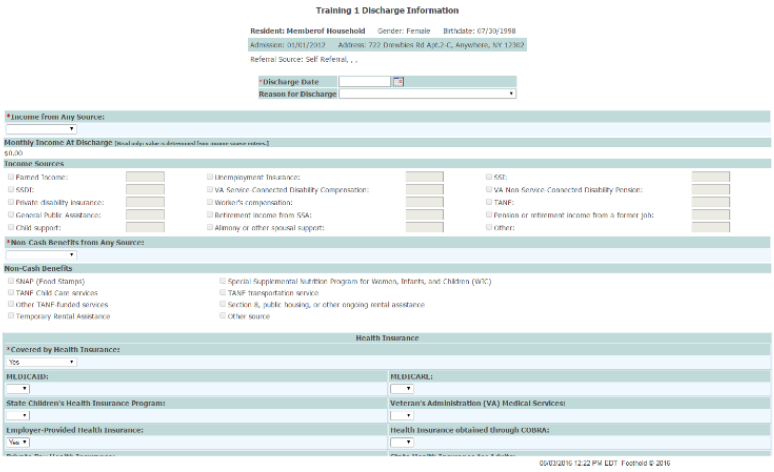
First Name	Last Name	Start Date	New Relation to Primary Client
Night	Sky	04/02/2018	Self
Grey	Sky	04/02/2018	
Blue	Sky	03/08/2018	

View Household Composition

Discharge household members along with the primary client.

Retain the household members, designate Night Sky as the primary client

4. Use the **New Relation to Primary Client drop-down** option to select new relations as appropriate for each household member who is not the new primary client. Click **CONTINUE**. *The Discharge Information page for the client being discharged will be displayed, as below.*

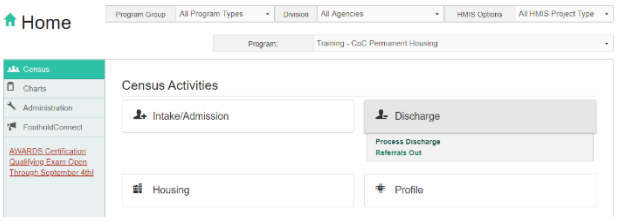


5. **Update** the necessary HMIS fields:
   - **Date** – Enter the client's discharge date.
   - **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
   - **Destination** – Click the drop-down menu to select the client's housing 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 the client is moving out of state select the appropriate option).
   - **Discharge Note** – Enter notes in the appropriate note text boxes.
6. Click **APPLY**. The client's discharge is processed**,** and *a read-only report version of the form will be displayed.*

26. Updating a Discharge Record

Complete the following steps to update a discharge record.

1. From the AWARDS Home screen, click the **Program** drop-down arrow and select the program associated with the client for whom the discharge record is to be updated.
2. Under **Census**, click **Discharge** and select **Process Discharge** from the fly-out menu (*see right*).

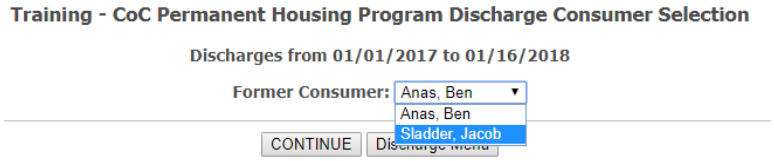


The Consumer Discharge Roster Selection page will be displayed, as below.

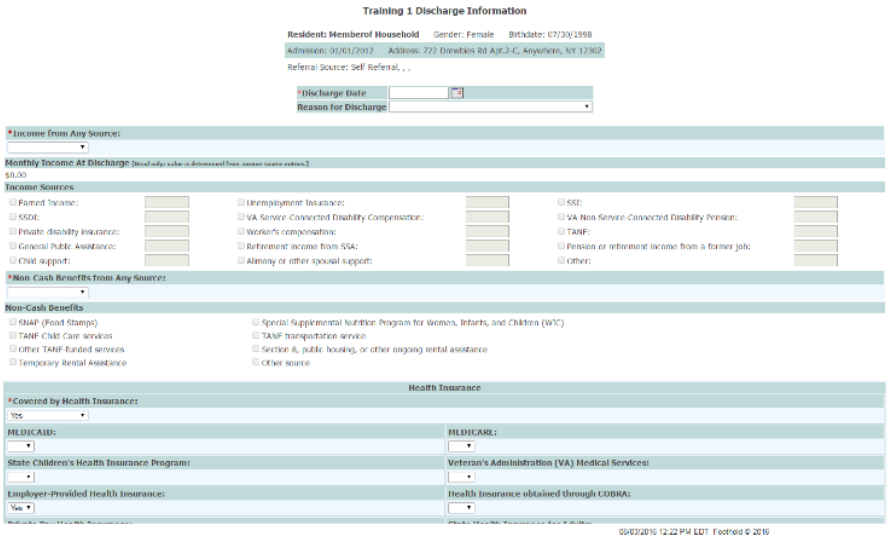
3. Click the **Discharges from** radio button, then change the **date range** as necessary (using mm/dd/yyyy format) so that the date of the discharge you want to work with is included.

✎ *NOTE: Only discharge records with a discharge date within the date range specified will be available for updating.*

4. Click **CONTINUE**. *The Discharge Consumer Selection page will be displayed, as below.*



5. Click the **Former Consumer** drop-down arrow and select the consumer for whom the discharge record is to be updated. Click **CONTINUE**. *The discharge record will be displayed on the Discharge Information page, as below.*



6. Edit/update the information on this page as necessary.
7. Click **APPLY**. The <u>discharge is processed</u>**,** and *a read-only report version of the discharge record will be displayed*.