CCHMIS USER GUIDE

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

CARES
OF NY, INC
ENDING HOMELESSNESS

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II. CCHMIS Resources

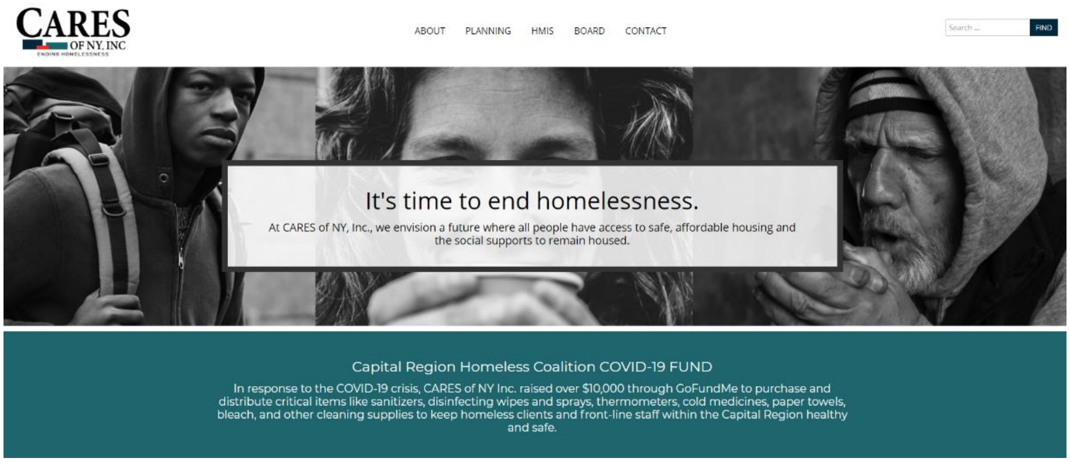
Successful data entry into the CARES COLLABORATIVE HMIS is critical for complete and accurate reporting. To assist with this, the CCHMIS Team maintains an online resource library as well request forms for CCHMIS access, reporting, and more.

CARES of NY Inc Website

All CCHMIS information is located on the CARES of NY Inc website: caresny.org

Navigating the CCHMIS Page

1. From the CARES of NY Inc Home Page select HMIS from the top navigation bar

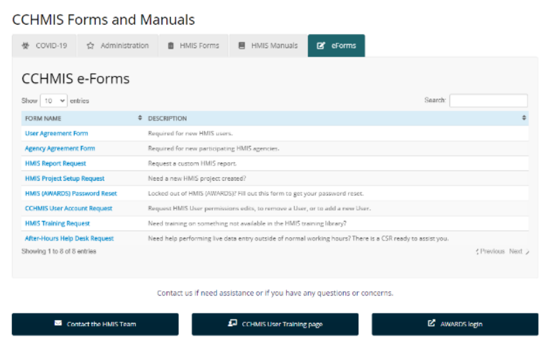


2. Select the topic of interest

Topic	Version	Sub-topic(s)
Forms and Manuals	Most Recent	COVID – 19 Documentation Administrative Forms and Manuals HMIS Forms HMIS Manuals *eForms
Reports	Most Recent and Historical	Data Quality and Completeness Reports Annual System Performance Measures Longitudinal Systems Analysis (LSA) Annual CoC Reports
User Training	Most Recent Written Guides and Recorded Tutorials	*HMIS New User Reporting Household Composition Data Entry Training Requests
Policy and Procedures	Most Recent	CCHMIS Administration Manual (Policies & Procedures)
Newsletters	Most Recent and Historical	Library of all Monthly CCHMIS Newsletters
AWARDS Log-in	N/A	Refreshes to the CCHMIS AWARDS Log-in page
*Indicates Sub-topics that are required of CCHMIS New Users		

e-Forms

To ensure accurate and timely replies to request from CCHMIS users it is required that all requests for access, trainings, reports, ect… are submitted through the website. Any requests not submitted using the appropriate e-Form will result in delays as the request will be returned to the sender with instructions to submit via e-Form.



<u>To submit an e-Form to the CCHMIS Team</u>:

1. Following the instructions above, navigate to the CCHMIS Forms and Manuals page
2. Select the type of request to be sent to the CCHMIS Team
3. Enter the required data and follow the prompts on each page of the request
4. Review each page to ensure there is no missing data and click submit

The request is automatically sent to the CCHMIS Team and the user will receive an email from the person who will be handling the request.

III. System Requirements

To ensure that AWARDS works correctly, the following software and hardware specifications are required.

Software Requirements

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
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 Safari should not be used in “Private Browsing” mode when accessing AWARDS.	Most Recent	Mac OS x iOS

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 should be set to “allowed” for the AWARDS website.

The 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 should be set to “allowed” for the AWARDS website within any pop-up blocker plug-in, to prevent interference with functionalities such as file downloads.

Hardware Requirements

Use of AWARDS requires 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.

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.

- **Unsecured or public WIFI networks should NEVER be used to access AWARDS**. If necessary, a secure mobile hotspot or mobile data should be used instead.

Security

All devices used to access AWARDS **must** follow the security guidelines described in the CCHMIS 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.

- 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. This protects any unauthorized user from accessing AWARDS, as well as any health information you may have downloaded from AWARDS to your device and forgotten to immediately delete, in the event that the device is compromised or stolen.

IV. Logging In and Out of AWARDS

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

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.
4. Usernames are provided to prospective users by a CARES HMIS Team member upon completion of the New User Training Series.
5. For initial login, the default password of CARESofNY#1234 will be used.
6. Click **Log In** or press **<Enter>**. The AWARDS Home screen will be displayed.
7. 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 CARESofNY#1234** as your password), you must:

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

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.
2. Click Log Out.
3. Close all browser windows.

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 first logged out. As a security measure, AWARDS automatically logs out any user that has been inactive in the application for fifteen minutes or more to prevent unauthorized access to the database.

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

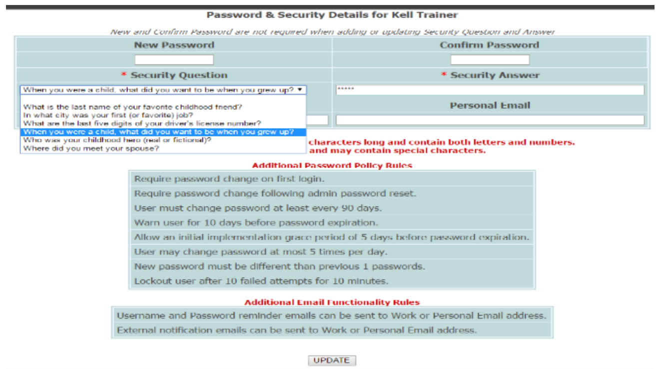
Password Reset/Recover Functionality

Set Your Security Details

AWARDS has a built-in Password Reset functionality that enables users to quickly and easily regain access to the system in the case of a forgotten username and/or password.

Any AWARDS user can take advantage of this tool, which requires only a single short form to be filled out with security details. After logging in to AWARDS:

1. Click the **Username drop-down** from the navigation bar.
2. Click **Password & Security**. *The Password & Security Details page will be displayed*.
3. Record your security details:
    1. Select a Security Question from the selection menu.
    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** to save.

Recover Your Username or Password

With the Password Reset functionality enabled, you will be able to use those handy "Forgot?" links on the AWARDS login page if you forget 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 details 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.

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

CARES HMIS Password Reset

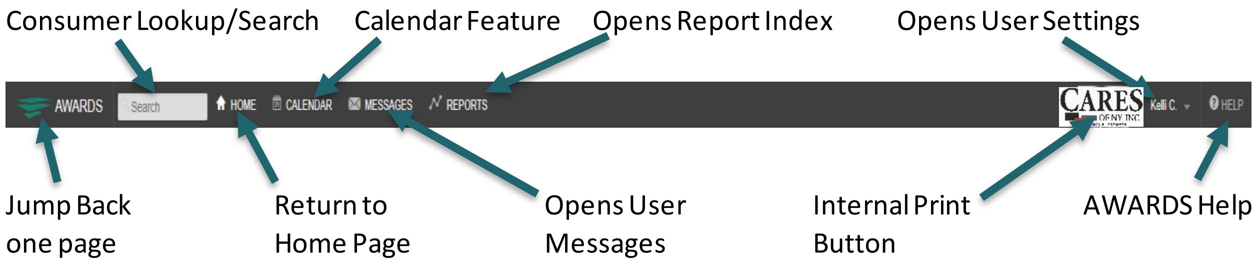
If you did not have the Recover functionality enabled, you must contact your Customer Service Representative. Account recovery should be achieved by the next business day but may take up to 24 hours therein.

NOTE: The default password of **CARESofNY#1234** will be used any time a user's password must be reset by a CARES HMIS team member.

V. AWARDS Structure

Top Navigation Bar

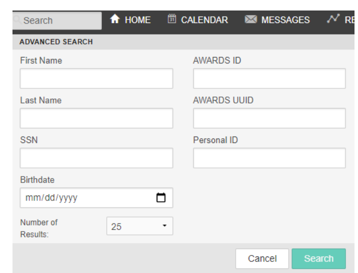
The top navigation bar offers access to the following features and displays throughout AWARDS.



This bar will adjust according to the screen size being used (i.e. smaller displays will display smaller icons).

Consumer Lookup/Search

Users are encouraged to complete a census search prior to entering new records as part of the intake/admission process.



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

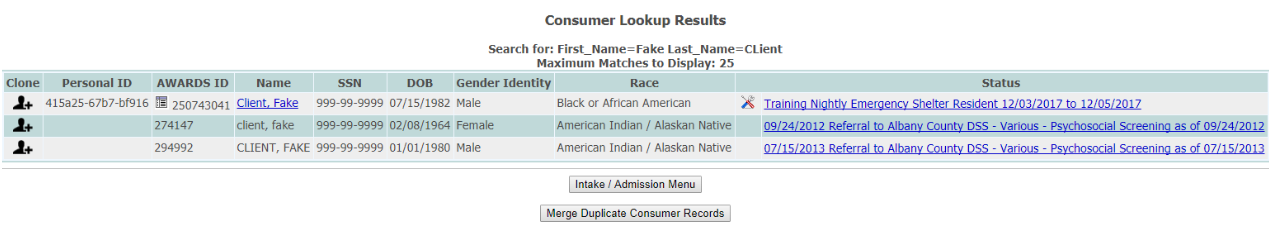
NOTE: On smaller screen sizes, the Search box will be the icon.

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

This page contains a list of clients for whom all or part of the identifying information entered on the previous page is a match.

NOTE : *By default client search results are sorted alphabetically by client last name. If needed, click a column heading to sort by the data in that column instead. Clicking a column heading a second time reverses the sort order.*

NOTE: On this page, the status of each client is listed next to his or her identifying information, and is a useful reference for determining which programs a client has been admitted or referred



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

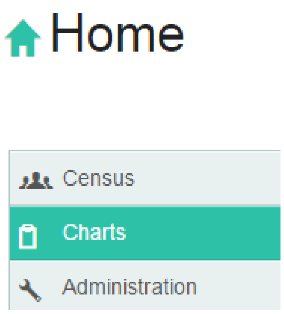
to.

3. Clients in programs that the user has chart access to will display as a blue, underlined text link.

4. 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 will not be links (regular text, grey).

Left-Side Menu

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



Census (default view) – Intake/Admission, Discharge, Housing, Profile.

Chart - Employment, Entitlements, Hospital, Incidents, Medical, Outcomes, Reception Desk, Services.

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

VI. Help Desk

When to Submit a Ticket

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

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.

Specific examples include:

1. Requests to delete a client from a program (*include all household members, if any, with the ticket).
    1. This request often occurs after admitting a client into the wrong program; clone the client into the correct program, and <u>then</u> 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 <u>know</u> is not accurate (e.g. the same data appears different when opened in an admission vs face sheet).
4. Any question or issue that requires a specific client's information to be shared.

- **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.

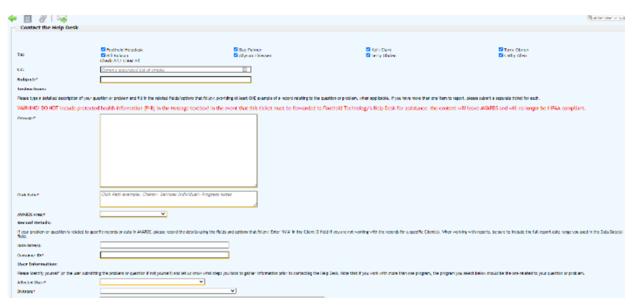
Submitting a Help Desk Ticket

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

In the event 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, seen right.

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).



2. In the "**Subject**" field, type a brief description of the problem/question.
3. In the "**Message**" portion of the form type a <u>detailed</u> description of your problem/question.
4. Include the text of any error messages received.
5. You may use client-level information here without breaching confidentiality.

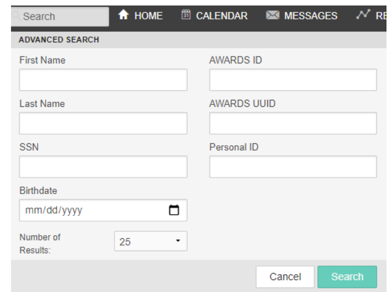
✎ NOTE: The more details you provide, the easier it is for the Help Desk to replicate your experience – thus speeding up the investigation process towards a solution.

6. In the “**Click Path**” field, list steps taken prior to the problem’s occurrence, including any options or selections made in the steps.
7. Select the area within AWARDS in which you have a question/problem from the “**AWARDS Area**” selection list.
8. Enter the Client ID in the “**Consumer ID**” field. If the client ID is unknown enter N/A.
9. Select your **name**, **agency**, and **program** from the remaining 3 selection list fields.
10. If available, please **attach screen shots or files** related to your problem or question in the "**Attachments**" portion of the form.
11. Click **SEND MESSAGE**, and then periodically check your AWARDS Messages inbox for a response.
12. 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).
13. Any of those individuals may review your submission and respond to you.
14. When a response is received, **review it carefully**. Any of the following may be included within the response:
15. 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. <u>Your issue cannot be resolved until you answer.</u>
16. A confirmation of your request being completed, and any details necessary for correct data entry in the future.
17. Step-by-step Instructions on how to resolve the issue you were experiencing.

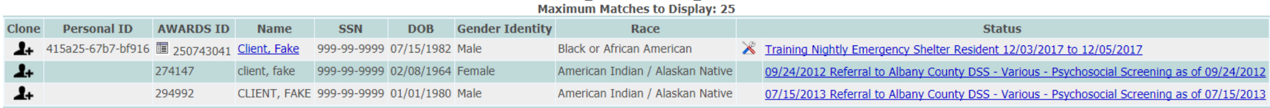
VII. Admissions

Users are encouraged to complete a census search prior to entering new records as part of the intake/admission process

Cloning and Completing an Intake



1. From navigation bar, click in the Client Search box (or click the Search icon). The Advanced Search window is displayed.
2. In the First Name and Last Name fields, type the first two letters of the client's first and last names, respectively.
3. Click the Limit Search Results to drop-down arrow and select the number of matches that should be displayed in the lookup results.
4. Click SEARCH. The Client Lookup Results page is displayed. This page contains a list of clients with records in the system for whom all or part of the identifying information entered on the previous page is a match.



Consumer Lookup Results

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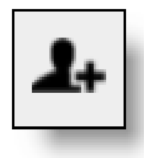
Intake / Admission Menu

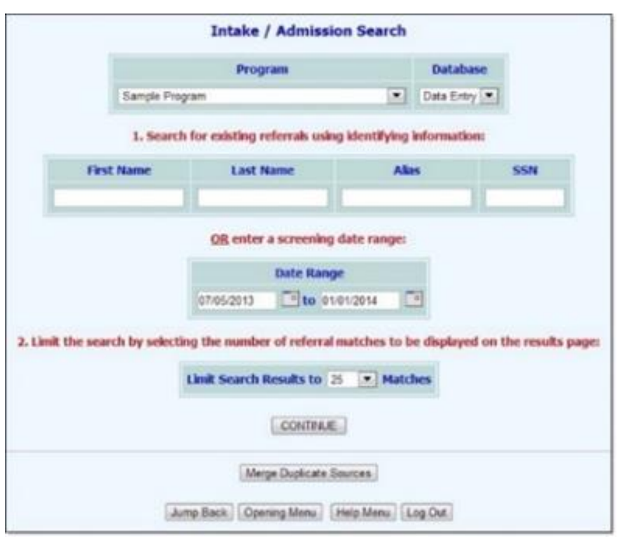
Merge Duplicate Consumer Records

5. If there is an existing record for the client you intend to admit, with the same exact SSN, same date of birth (DOB), and with identically spelled first and last names, you will be able to perform intake/admission cloning. To do so, click the **Clone** icon to the left of the record to be cloned.



The Intake/Admission Search page is opened with the client's first name, last name, SSN, and program information automatically filled in.

6. If the client is not being re-admitted to the program he/she was in previously, click the **Program** drop-down arrow and select the correct program for this intake; otherwise, leave the current selection as is.
7. Click **CONTINUE**. The Referral Search Results page is displayed.



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8. Click **Create New Application**. A new intake form is opened and shown on the Referral Information Form page. Because you are cloning existing data many of the fields/options on the form will already be filled out. Others, which must be configured on a program-by-program basis (such as Income), will be blank.

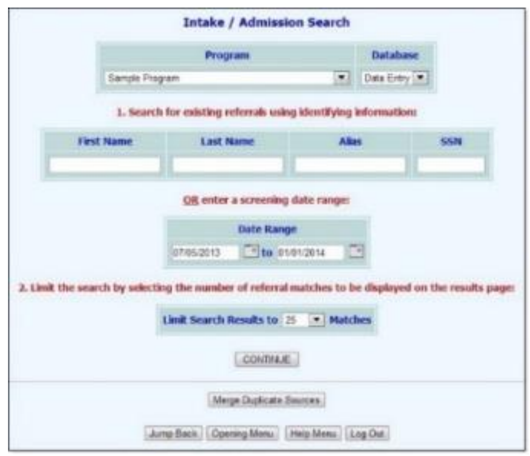
Clients in a divisional database cannot be cloned across divisions. If a CoC user admits a client into a program using the cloning functionality and the only previous program history for the client is in a different division, AWARDS will not pre-populate the referral form with client information.

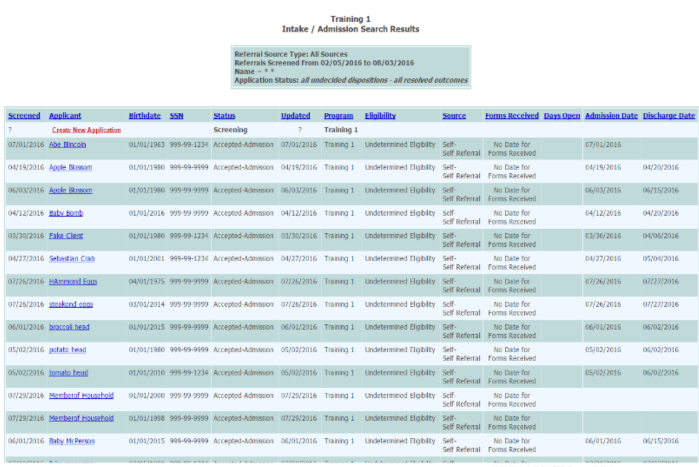
9. Review all cloned data in the form to verify that it is still current. Make changes to the old data where appropriate, and then configure any blank fields/options as needed.
10. At this time, complete one of the following tasks based on the intake/admission process used by the program:
    1. When using single - step intake - **Click HOUSING ADMISSION** or to admit the client (which label is used for this button is determined by the program type – residential or non-residential, respectively).

       If the client is to be rejected rather than admitted, click **Not Accepted Into Program**. The client's intake form is then saved with a status of rejected.
    2. When using multi - step intake - Click **CREATE REFERRAL** to save the form, and then continue the intake/admission process.

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.
3. In the **First Name**, **Last Name**, and/or **Alias** fields, type the consumer's name, initials, and/or alias.
4. Click **CONTINUE**. *The Intake/Admissions Search Results page will be displayed, as below.*

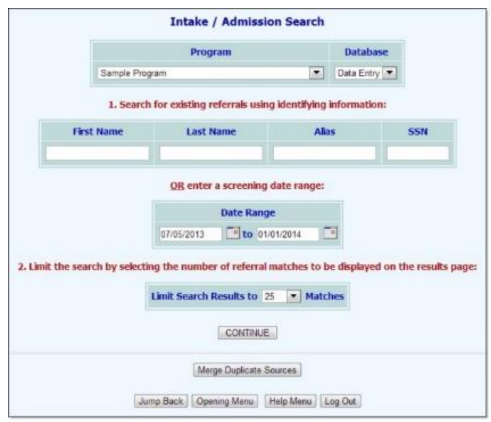




This page contains a list of any existing intake records that have matching identifying information to what was entered in the Intake Records Search.

5. From the "Applicant" column, click **Create New Application**. *The Admission Form page will be displayed.*
6. **Complete the admission form by configuring the fields and options on this page as necessary**.
    - Depending on funding source, some programs may require different amounts of entry at intake/admission than others; accordingly, the fields and options on the admission form are often different from program-to-program.
7. **RESIDENTIAL PROGRAMS ONLY**: Residential programs that are set to collect household information contain a Residence drop-down list that is separated into two sections:
8. **Vacant Units**: The beds belong to apartments/units where all beds are listed as vacant.
9. **Occupied Units**: The beds 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.
10. Click **HOUSING ADMISSION** / **PROCESS ADMISSION** (the label for this button is determined by the program type, residential or non-residential, respectively).
11. 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.
12. 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.**

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. Click the **Database** drop-down arrow and select "**Data Entry**."
4. 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:
5. **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.
6. **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 referrals with screening dates in the range entered here are included in the search results.
7. Click **CONTINUE**. *The Intake/Admissions Search Results page will be displayed.*

8. From the "**Applicant**" column, click the **name of the consumer being re-admitted**. *The Admission Form Options page will be displayed, as below.*

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

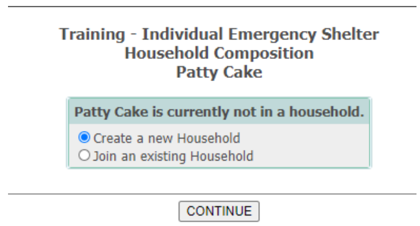
    - **WARNING!** Please be mindful to **update the Living Situation section of the admission form**. Otherwise, AWARDS will <u>not</u> update the number of times a person has been homeless.

12. Click **HOUSING ADMISSION** / **PROCESS ADMISSION** (the label for this button is determined by the program type, residential or non-residential, respectively).
13. 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.
14. 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.**

VIII. Household Composition

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

NOT Currently in a Household



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

Create a New Household

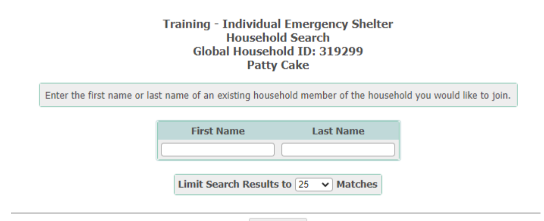
1. If the client should be placed in a **new** household, select **Create a new Household** and click **CONTINUE**
   1. This option creates a new household in AWARDS and places the client into the household as the primary client.
   2. The **Household Start Date** is created by AWARDS using the client's admission date as their Household Start Date

The Household Composition page is displayed (see right)

- NOTE: If the client does not have any other household members living with them, you can click the **HOME** button to navigate away from this page
- NOTE: If the client DOES have other household members living with them the user MUST add them to the household and complete/process an admission for each household member. The instructions are located in the "**Add Members to a Household**" section of this guide

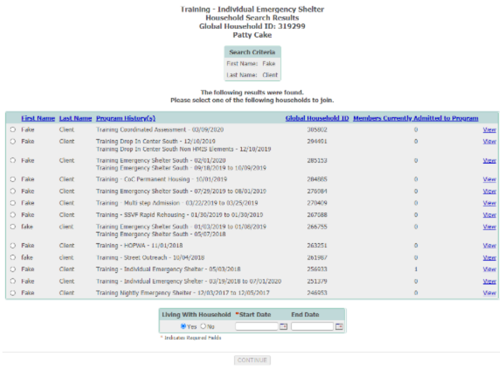
Join to Existing Household

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



- 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 household member's first and last names).

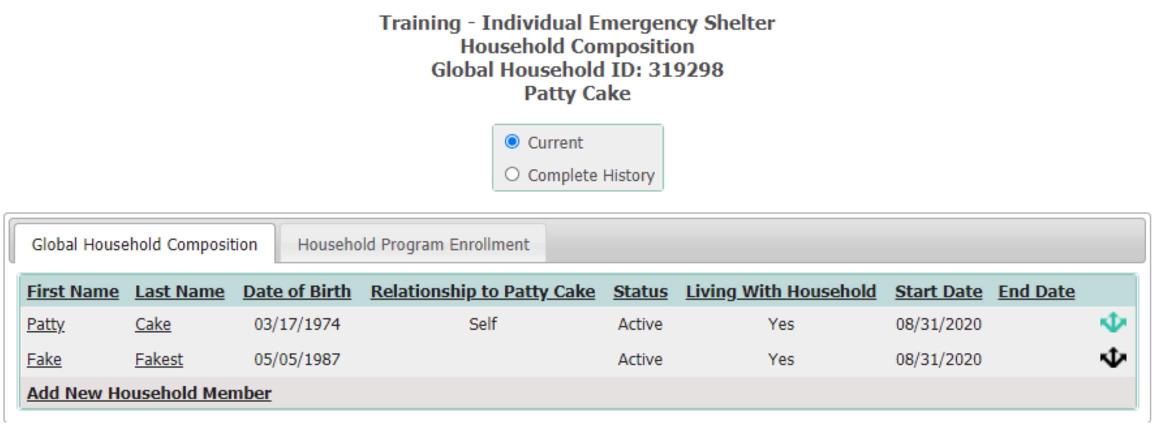
5. Click **CONTINUE**. *The Household Search Results page will be displayed, as below.*



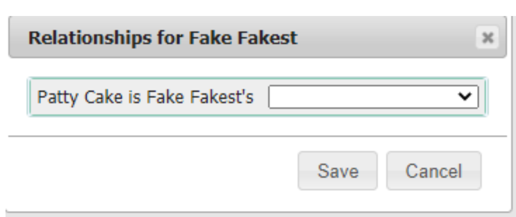
This page contains a list of clients with records in the system for whom the identifying information entered on the previous page is a match.

6. Select the radio button next to the name of the client whose household you are adding to.
7. Beneath the table of search results, in the **Living With Household** portion of the page, the "**Yes**" radio button is selected by default.
8. 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**.
9. In the **Start Date** field, type the date that the new household member became a member of the household. Click **CONTINUE. The client will be added to the household.**

   The Household Composition page is displayed, as seen below



10. Click the black Relationship icon to update the relationship (mother, brother, child, ect) to the primary client/Head of Household
11. Select the relationship the client has with the Head of Household from the dropdown menu



EXAMPLE: Patty Cake just moved in with her child Fake Fakest. By clicking on the black Relationship icon, we have to indicate who Patty is to Fake: In this case we will select Mother for the Relationship.

IS Currently in a Household

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

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 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**. 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 previous page for instructions*).

Add Members to a Household

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)*.
3. In the **First Name**, and **Last Name** fields, type identifying information for the household member being added.

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 household member's first and last names).

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

5. Review the search results:
6. 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.
7. If the household member being added **does not appear** on the list of matches, continue to the next step.
8. Clients that appear with a **red icon** next to their name (*see right*) already belong to a household within the agency.

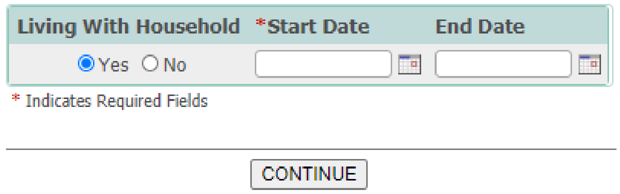
AWARDS will only allow a client to be active in one household at a time. To see the details of the household to which the client belongs, click the red icon next to his or her name; the Household Composition page for that household will be displayed in a pop-up window over the search results page. From there, you can **Edit Household Composition** of that household (e.g. to remove the client to be able to place them in the first household) or **Close**.

9. Click the **New Record** radio button in the last row of the search results.
10. AWARDS will automatically refresh, and **the following data entry fields will appear** for completion:

The First Name and Last Name will be pre-populated with any search criteria entered on the previous page.

11. **First Name -** Type the first name of the new household member as it should appear throughout the system.
12. **Last Name -** Type the last name of the new household member as it should appear throughout the system.
13. **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.
14. **Gender -** Click this drop-down arrow and select the gender of the new household member.

15. In the **Living With Household** section of the page, the "**Yes**" radio button is selected by default, *as below*.

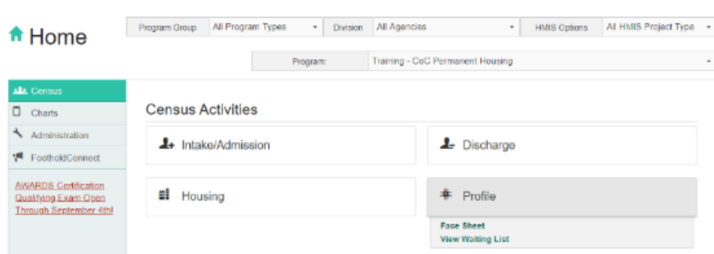


16. If the household member being added **does not actually reside with the primary client and you wish to capture that detail, click the "No" radio button**.
17. In the **Start Date** field, type the date that the new household member became a member of the household. Click **CONTINUE.** *A pop-up message will be displayed*.
18. The pop-up asks if the household member **should** be admitted:
19. 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.
20. Click **No,** and you will be *returned to the starting page.*
21. To add another household member to the household, select **Add New Household Member** and complete the above steps again.
22. If no further household members should be added to the household, select **No** and click **HOME** to navigate away from this screen.

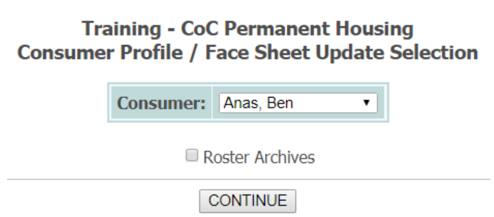
Option 2: Adding to the Household After Admission

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

1. From the AWARDS Home screen, click the **Program** drop-down arrow and select the program associated with the primary client of the household to be updated/ added to.

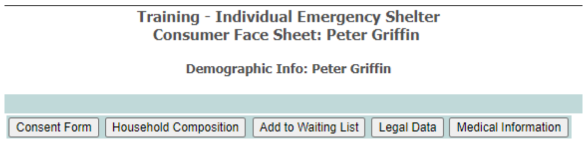


2. Under **Census**, click **Profile** and select **Face Sheet** from the fly-out menu (see right).
The Consumer Profile / Face Sheet Update Selection page will be displayed, as below.

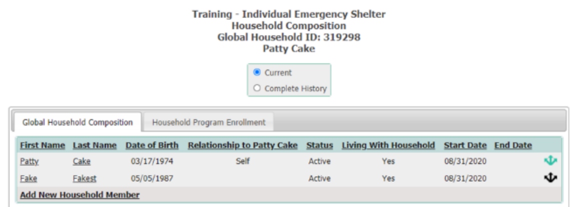


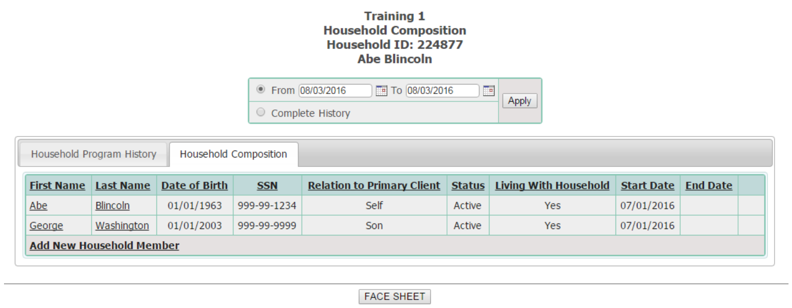
3. **Select** either Current Roster or Roster Archives.
   - If the primary client of the household to be added to is a former (discharged) consumer, click the **Roster Archives** check box.

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 Composition Tab**. *The Household Composition/information page will be displayed, as right.*
6. Select the **Global 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.

Relationships

To edit the Relationship information within the Household Composition feature, complete the following steps:

1. Access the Household Composition feature of the client for which you are editing information, as described on the previous page; Option 2: Adding to the Household After Admission, or select the primary client if the household member for whom you are editing information is not admitted into an agency program.

By default, the "Global Household Composition" tab is displayed, listing all current household members (as of today's date).

2. Locate the household member you are updating/editing Relationship information for.
3. Click the Update Relationships icon for the individual whose relationship information is to be edited.

NOTE: The Update Relationships icon is green for the individual through whose records the household was accessed. For all others the icon is black.

The Relationships for [household member] pop-up is displayed.

4. Click each of the drop-down arrows on this page and select or make changes to the corresponding relationship designation to reflect how the household member is related to the existing household members.
5. Click Save to apply your changes. The Household Composition page is re-displayed with "Global Household Composition" tab visible.

   NOTE: The "Global Household Composition" tab only shows relationship information for the individual through whose records you accessed the Household Composition feature. As a result, you may not see all of the relationship information you just updated reflected here.

IX. Client Face Sheet

IMPORTANT NOTICES

- **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.

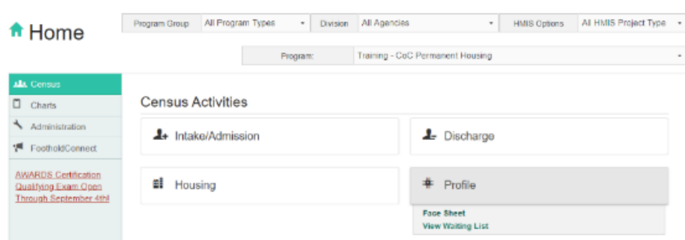
- All clients and household members enrolled in CoC-funded projects for 365 days or more must have an annual assessment completed.

The assessment must have an effective date recorded in the ***HMIS Info section*** of the Face Sheet record.
The assessment must occur 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.

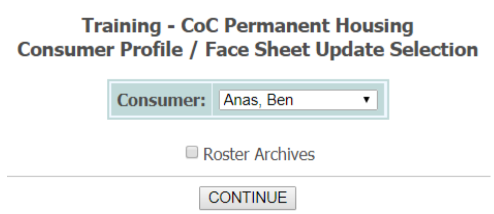
Updating a Client's Face Sheet

To navigate and update a client's Face Sheet record:

1. From the AWARDS Home screen, click the **Program** drop-down arrow and select the program associated with the consumer whose household composition needs to be updated.

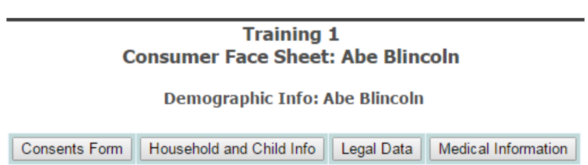


2. Under **Census**, click **Profile** and select **Face Sheet** from the fly-out menu (see right).
   The Consumer Profile / Face Sheet Update Selection page will be displayed, as below.

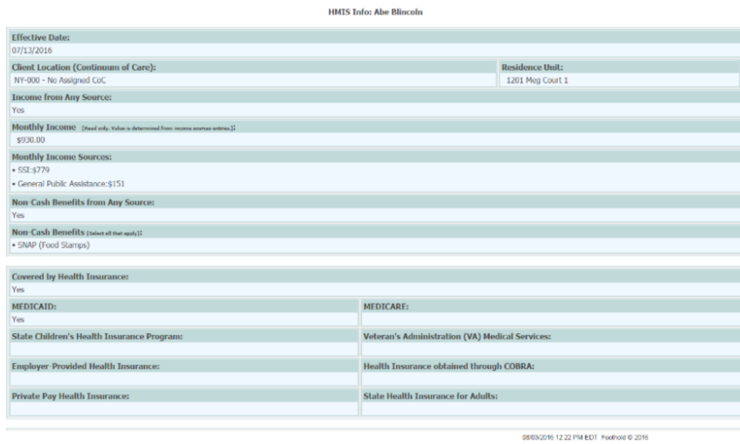


3. **Select** either Current Roster or Roster Archives.
   1. If the face sheet to be updated is for a former (discharged) consumer, select the **Roster Archives** check box.

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.*



5. Update the face sheet information (*see below*) as necessary by configuring the fields and options in one or more of the available sections.



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

6. When all face sheet information has been updated as necessary, click **UPDATE**.

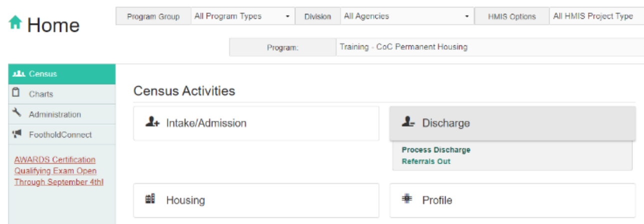
X. Discharges

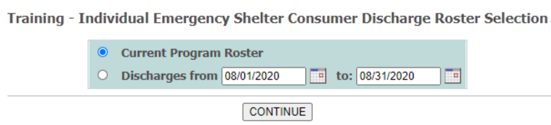
✎ NOTE: A discharged client is included on the current roster of a program up to and including his or her discharge date for that program. After the discharge date, he or she is moved to the program's roster archives.

Individual Discharge

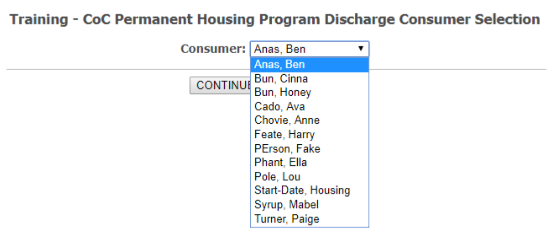
Complete the following steps if the client to be discharged is the <u>only</u> person in their household.

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.

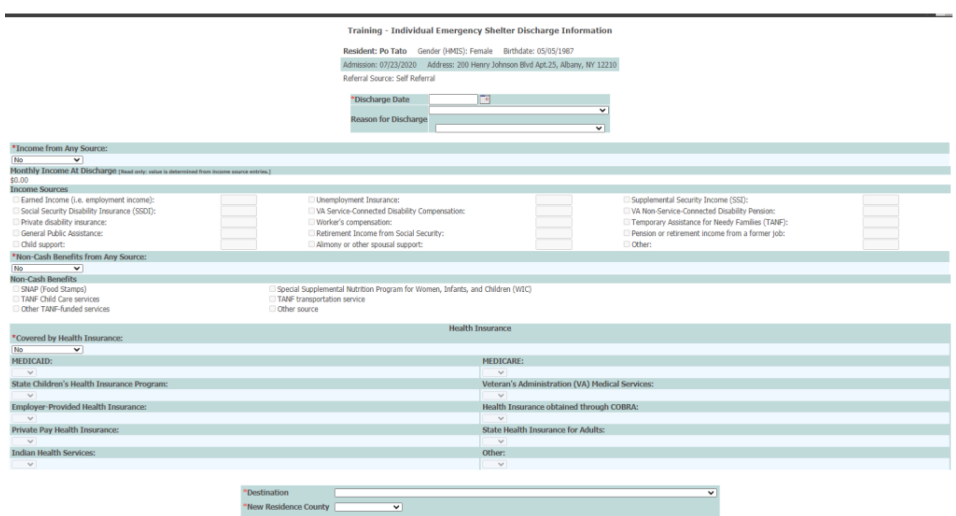




3. Confirm that the **Current Program Roster** radio button is selected. Click **CONTINUE**.
   The Discharge Consumer Selection page will be displayed, as below.



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.



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5. **Update** the necessary HMIS fields:
6. **Date** – Enter the clients' discharge date.
7. **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
8. **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).
9. **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).
10. **Discharge Note** – Enter notes in the appropriate note text boxes.

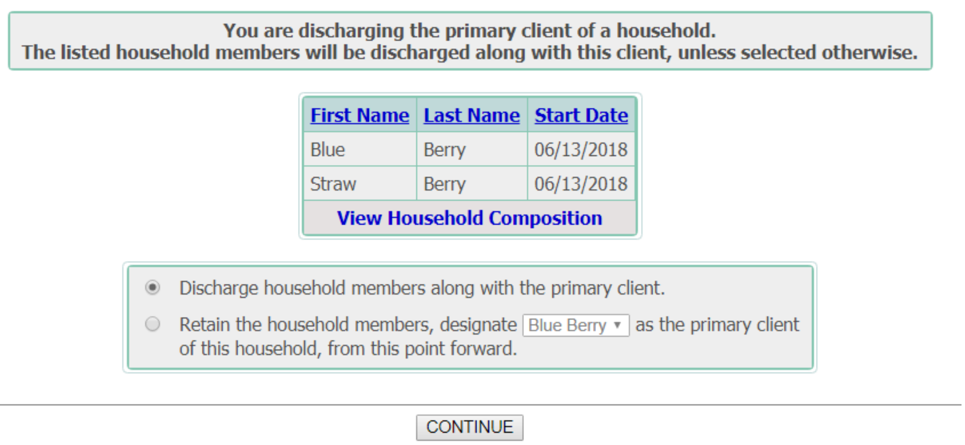
    - WARNING! Special Needs is only updated in the client's admission record. Do NOT update Special Needs Information on the Discharge Record.

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

Primary Client in a Household Discharge: 2 Options

Follow the instructions below if the client to be 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.

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*.



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	Start Date
Blue	Berry	06/13/2018
Straw	Berry	06/13/2018
View Household Composition		

Discharge household members along with the primary client.
Retain the household members, designate Blue Berry as the primary client of this household, from this point forward.

CONTINUE

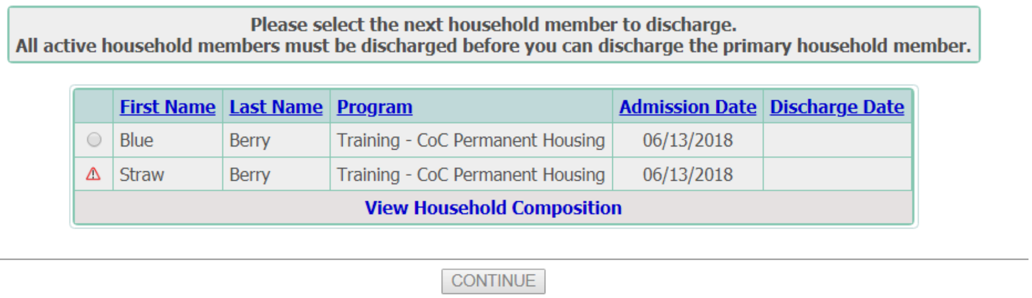
The message at the top of the page states "You are discharging the primary client of a household. The listed household members will be discharged along with this client, unless selected otherwise."

2. Select one of the options from below the Household Members table – each is described in further detail on the following pages.

Option 1: Discharge All Household Members

- All other household members 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 each household member to be discharged will be displayed, as below.*

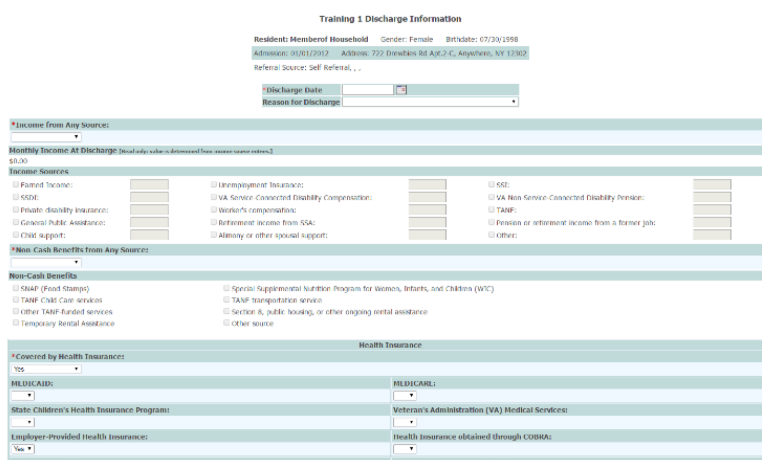

Please select the next household member to discharge.
All active household members must be discharged before you can discharge the primary household member.

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

View Household Composition

CONTINUE

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.*
3. **Update** the necessary HMIS fields:
4. **Date** – Enter the client's discharge date.
5. **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
6. **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).

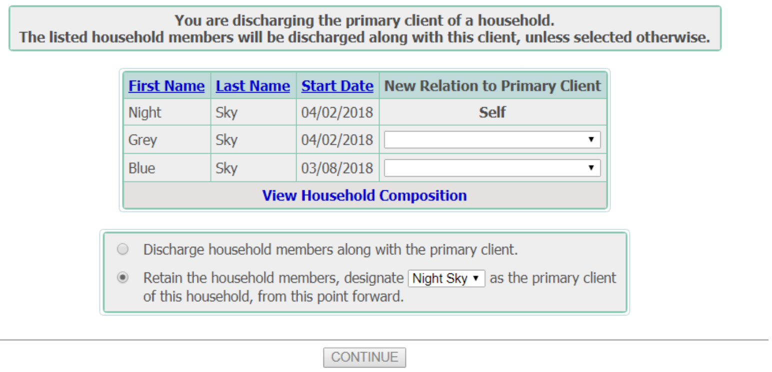


7. **New Residence County** – Click the drop-down menu to select the NYS county that the client will be residing in upon discharge (if the client is moving out of state, select the appropriate option).
8. **Discharge Note** – Enter notes in the appropriate note text boxes.
9. Click **APPLY**. The household member's **discharge is processed,** and *an updated household member table will be displayed.*
10. **Repeat steps 2-4 until all household members have been discharged.** The radio button then opens for the primary client, allowing that last discharge to be processed.

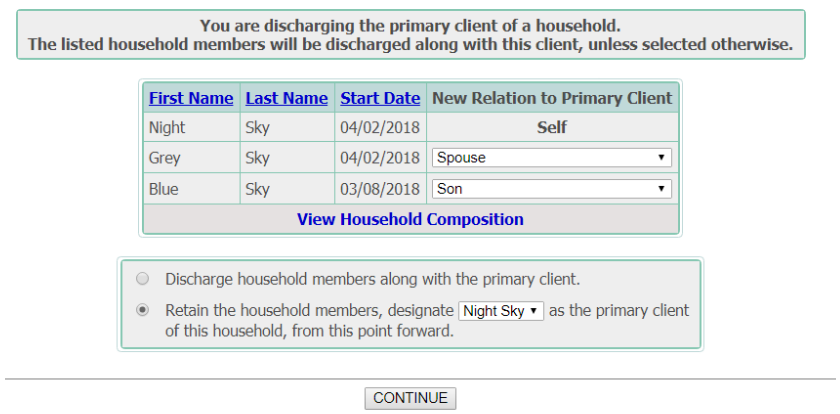
    The Discharge Date, Destination, and New Residence County fields will all prepopulate with the first household member's information as AWARDS "assumes" that a household being discharged at the same time will remain together.

Option 2: Keep Other Household Members

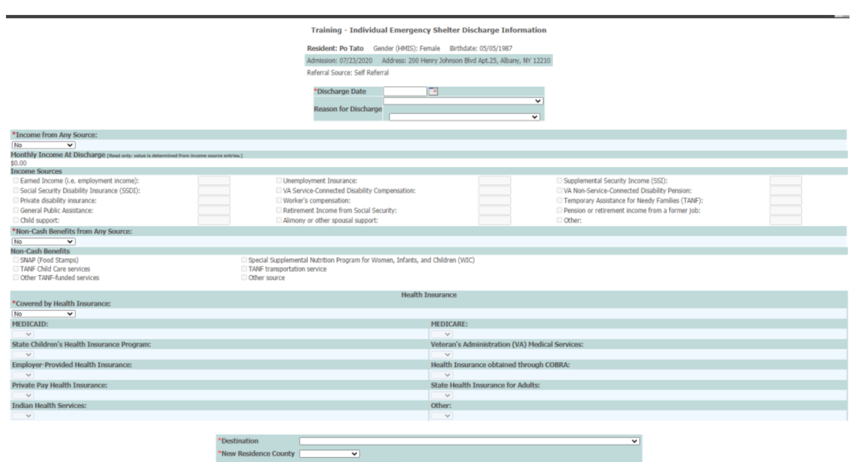
1. If only the primary client is being discharged and the remaining household members are staying in the program, click the **Retain the household members, designate ____ as the primary client of this household, from this point forward** radio button.



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, and a drop-down option will be displayed for each household member who is not the new primary client.



4. **Select new relations as appropriate**. Click **CONTINUE**. *The Discharge Information page for the client being discharged will be displayed, as below.*



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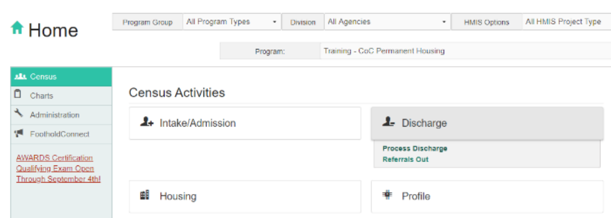
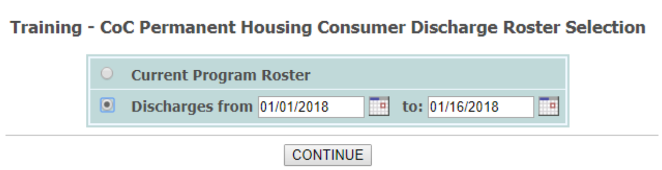
5. **Update** the necessary HMIS fields:
6. **Date** – Enter the client's discharge date.
7. **Income, Non-Cash Benefits and Health Insurance** – Should be updated on the client's face sheet PRIOR to being discharged.
8. **Destination** – Click the drop-down menu to select the client's housing situation at discharge (do not select "other" as, 99.999% percent of housing situations do in fact fit into the drop-down options provided).
9. **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).
10. **Discharge Note** – Enter notes in the appropriate note text boxes.
11. Click **APPLY**. The client's **discharge is processed,** and *a read-only report version of the form is displayed.*

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.

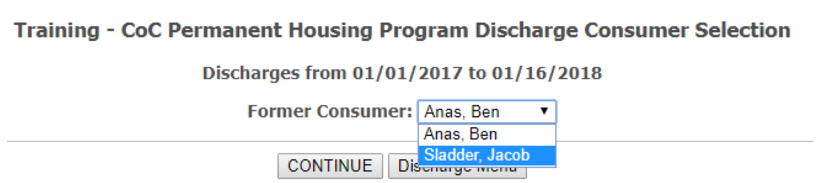




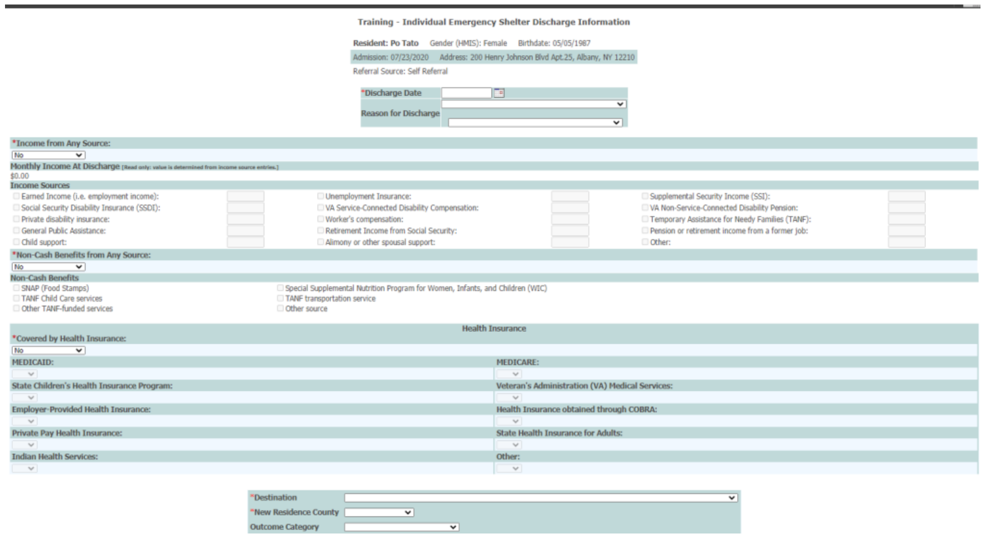
3. Click the **Discharges from** radio button, and then make changes to the default **date range** as necessary (using mm/dd/yyyy format) so that the date of the discharge you want to work with is included.

   Only discharge records with a discharge date that occurs 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 Client** 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. Make changes or additions to the information on this page as necessary.
7. Click **APPLY**. The **discharge information is saved** *and a read-only report version of the discharge record will be displayed on the Discharge Information page*.