

Coordinated Entry – Cloning in the HMIS Database

HMIS AWARDS Database. (<https://cares.footholdtechnology.com/>)

This guide is intended to walk through utilizing the cloning feature in the HMIS AWARDS Database. Cloning allows for the information collected at intake in one program to be transferred through a few simple clicks to another program within the system.

To clone a record over, start with a record that has already been admitted into an existing program in HMIS. In the top left Search bar, enter the first and last name of the record you wish to clone and then search, as shown below.


The screenshot shows a web browser window with the HMIS AWARDS database interface. The search bar at the top contains the text "Nota Person". Below the search bar, the "ADVANCED SEARCH" form is displayed with the following fields: First Name (Nota), Last Name (Person), SSN (empty), Birthdate (mm/dd/yyyy), AWARDS ID (empty), AWARDS UUID (empty), and Personal ID (empty). The "Number of Results" is set to 25. A red arrow points to the "Search" button.

Figure 1

Select the shadow figure with a plus sign below.

Consumer Search Results

Search for: First_Name=Nota Last_Name=Person
Maximum Matches to Display: 25

Clone	Personal ID	AWARDS UUID	AWARDS ID	Name	SSN	DOB	Gender Identity	Race	Status
	415bd4-1b9c-01ac8	83895d43e74a470c910cb2ef07f04dd8	333288041	Person, Nota	123-45-6789	01/01/2000	Male	White	TRAINING PROGRAM COORDINATED ENTRY In Program since 02/01/2021

Intake / Admission Menu

Merge Duplicate Consumer Records

Figure 2

After selecting *Clone*, use the program drop down menu that appears on the next screen to indicate the program the record is being cloned into, verify the name and SSN is correct and select *Continue* as shown below.

Intake / Admission Search

Program
Database

1. Search for existing referrals using identifying information:

First Name	Last Name	Alias	SSN
<input type="text" value="Nota"/>	<input type="text" value="Person"/>	<input type="text"/>	<input type="text" value="123456789"/>

OR enter a screening date range:

Date Range

to

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

Limit Search Results to Matches

Figure 3

On the next screen to appear select *Create New Application*.

Training RRH
Intake / Admission Search Results

Referral Source Type: All Sources
Name = Nota Person SSN = 123456789
Application Status: *all undecided dispositions - all resolved outcomes*

Screened	Applicant	Birthdate	SSN	Status	Updated	Program	Eligibility	Source	Forms Received	Days Open	Admission Date	Discharge Date
?	Create New Application			Screening	?	Training RRH						

Figure 4

After selecting *Create New Application* the intake screen will appear allowing you to review and make necessary updates in the record. Since all information is pulled from one program to another you will want to verify the data in the new record is true to the client's current situation.