FOOTHOLD TECHNOLOGY

Where Do I Find...

AWARDS Menu Fly-Outs

Overview

As part of our ongoing series of improvements to the look and feel of AWARDS, we've been replacing standard module menu pages in AWARDS with menu fly-outs. These changes were previously deployed for Charts and Census modules, and are now being deployed for Administration modules as of **October 3rd 2018**. Each module that has been transitioned to the new menu fly-out structure will, when clicked from the *Home* screen, display a menu list containing all features located within that module. Clicking a feature from the list takes you directly to the next screen in the selected feature's data entry workflow - be it an index, settings page, client selection page, or otherwise.

About This Document

As part of the menu fly-outs deployment, some older AWARDS features were moved or replaced. We've also discontinued a few obsolete features, and made some general navigation changes. This document is designed to guide you through all changes in impacted modules so that you can quickly and easily find the features you use most.

Forms - Learn how to find the FormBuilder forms that were previously available on menu pages.
Reports - Learn how to find the charts-related reports you care about.
Administration - NEW! Review which features are located in each Administration module, and learn about any changes.
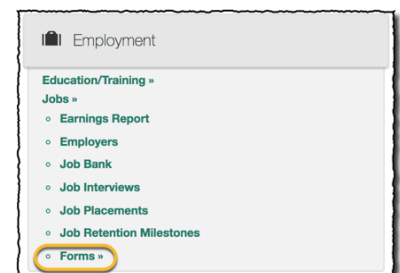Census - Review which features are located in each Census module, and learn about any changes to those modules.
Charts - Review which features are located in each Charts module, and learn about any changes to those modules.
Other Changes - Learn about other updates to AWARDS layout and navigation.

Forms

Forms that were set to display as a button on a menu page (specifically, under Medical, Employment > Jobs, or Services) are now listed under a **Forms** item within that module or feature's menu fly-out.

If you are looking for a button that used to appear on a menu page, check to see if it is listed under **Forms** for that module or feature.
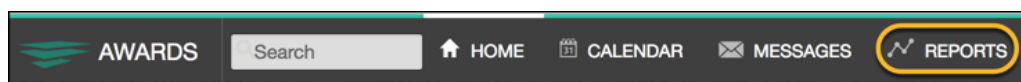

Reports

The **Database** mode drop-down selection option used to toggle between data entry and report modes on menu pages has been removed for Charts modules. The new data entry / report viewing workflow is as follows:

- **If you have data entry access** to a Charts module, clicking an item from the fly-out menu automatically takes you into the selected feature in data entry mode. To view the reports for those modules:

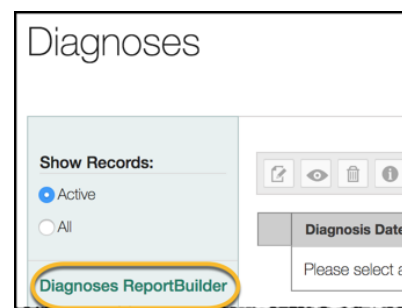- **Use the Reports module located in the AWARDS navigation bar**.

When working in the Reports module note that:

- By default the Reports index page lists **all reports**; however, there are additional filters in the left-hand menu for all **ReportBuilder** reports and **Bookmarked** reports.

- To bookmark your favorite reports, click the **star** icon to the left of each. Once reports are bookmarked, the default display for the Reports index page automatically switches to those bookmarked reports.

- The Reports index can be sorted, searched and filtered to help locate the report you need.

- Because some reports only apply to specific program types, remember to use the **Program** selection option in the upper-right corner of the index page to select the program or group of programs for which the report is to be viewed, before you select the report.

- **Use the ReportBuilder link in the left-hand menu of the feature's index.** This option is only available for select AWARDS features; for example, Diagnoses.

- **If you have read-only access** to a Charts module, clicking an item from the fly-out menu automatically takes you into the selected feature in report mode. Report settings pages and ReportBuilders display in this case, as expected. If there is a report you're unable to locate, check the Reports module located in the AWARDS navigation bar, or refer to the tables within this document.

Administration

The Administration modules impacted by menu fly-outs changes are detailed here for your reference. For each module there's a list of which features can be accessed from the fly-out menu, as well as a table describing other important changes to that module.

Agency File Cabinet

Files stored here by agencies will be listed on the fly-out menu, as well as the **Attach/Edit Document** option for those assigned the "Add/Edit Agency File Cabinet Documents" permission.

Builders & Tools - NEW!

The following features used to be accessible directly under Administration, but are now located on the menu of the new Builders & Tools module:

- **FormBuilder**
- **PlanBuilder** (if set to display)
- **ListBuilder** (if set to display)
- **Providers Directory** (if set to display)

- **Referral Agencies (or Referral/Provider Agencies)**
- **Waiting List Configuration** (if set to display)

Changes to Builders & Tools

N/A

Fiscal

The Fiscal/Program module has been relabeled to Fiscal. The previous menu page varies for each database based on funder, division, and billing needs. All items that were previously available on the menu for users will be located on the Fiscal fly-out, and direct users to the same pages as before.

Changes to Fiscal

N/A

Human Resources

The following features are located within the Human Resources module, as they were previously:

- **Accruals/Time Off**
- **Holiday Schedule**
- **Organization Chart**
- **Salary History**
- **Staff Information**
- **Staff Training**
- **Forms** (FormBuilder forms set to display in this location)

Users **without** access the Human Resources module continue to see the **Organization Chart** module under Administration.

Changes to Human Resources

The Human Resources features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Employee Demographics Report	Now located in the **Reports** module.
ReportBuilders	Now located in the **Reports** module. Search for the following: ● Employees ReportBuilder ● FormBuilder ReportBuilder ● Staff Training ReportBuilder
Credentialing	No longer available as a stand-alone feature. Accessible through the **Staff Information** feature in data entry mode, and via the **Employees ReportBuilder** for reporting purposes..
Payroll Status	No longer available as a stand-alone feature. Accessible through the **Staff Information** feature in data entry mode, and via the **Employees ReportBuilder** for reporting purposes.

Work Schedules	No longer available as a stand-alone feature in HR. Accessible through the **Staff Information** feature in data entry mode, through the **Attendance** feature (if set to display), and via the **Employees ReportBuilder** for reporting purposes. **Note:** Users with read only or work supervisees access to HR will continue to be able to access work schedules in data entry for their supervisory tree by accessing it through **Attendance**.
Phone Lookup	Replaced with new "Foothold Report - Phone Lookup" saved format accessible on the **Employees ReportBuilder**.

Operations

The following features are located within the Operations module, as they were previously:

- **Fiscal Forms**
- **Property Maintenance**
- **Leases**
  - **Lease Information -** NEW RULE - Users working with Lease Information will now need chart access permission to the programs in which leases are to be maintained.
  - **Agency Residence Units**
- **Rent & Utilities**
- **Rides**
  - **Ride Requests**
  - **Ride Sheets**
  - **Ride Billing**
  - **Rides Today**
  - **Rides Tomorrow**
- **Trackers**
  - **Any configured ResourceTrackers and configuration options set to display**

Changes to Operations

The Operations features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Resident Information	Replaced with new "Foothold Report - Resident Information" saved format accessible on the **Demographics ReportBuilder**.

System Setup

The following features are located within the System Setup module, as they were previously:

- **Agency Program Information**
  - **Add/Edit Entire Program**
  - **Configure Administration**
  - **Configure Data Elements**
  - **Configure Locations**
  - **Create Program Groupings** (if set to display)
  - **Discontinued Programs**
  - **PATH Information**
- **Permissions Maintenance**

- **Local Help Desk Staff**
- **Residence Units**
- **DataBridge Files** (if set to display)
- **HMIS Data Export** (if set to display)
- **Card Swiping Upload** (if set to display)
- **Business Rules**
- **Interoperability Center** (if set to display)
- **Import Tools**
- **Login Maintenance**
  - **Agency Summary Report**
  - **Block Login Access**
  - **Create New Login**
  - **Update User Group**
  - **Password Reset**
  - **Restricted Census Access** (if set to display)

Changes to System Setup

The System Setup features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Agency Program Information > **Agency Programs ReportBuilder**	Now located in the **Reports** module.
Login Maintenance > **User Login ReportBuilder**	Now located in the **Reports** module.
Login Maintenance > **Audit trail ReportBuilder**	Now located in the **Reports** module.

Census

The Census modules impacted by menu fly-outs changes are detailed here for your reference. For each there's a list of which features can be accessed from the module's fly-out menu, as well as a table describing other important changes to that module.

Discharge

The following features are located within the Discharge module, as they were previously:

- **Follow Up Notes** (if set to display)
- **Pre-Discharge Status** (if set to display)
- **Process Discharge**
- **Referrals Out** (if set to display)
- **Forms** (FormBuilder forms set to display in this location)

Changes to Discharge

The Discharge features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
OASAS Reports	Now located in the **Reports** module. Search "OASAS Reports" in the search bar to see the option to run the PAS-44, PAS-45, PAS-47 and PAS-125.

Housing

The following features are located within the Housing module, as they were previously:

- **Nightly Absences** (if set to display)
- **Residence Swap / Unit Phone** (if a residential program is selected)
- **External Housing** (if a non-residential program is selected)

Changes to Housing

The Housing features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Bed Registry Report	Now located in the **Reports** module.
Housing Report	Now located in the **Reports** module.
Housing Utilization Report	Now located in the **Reports** module.
Nightly Absences Report	Now located in the **Reports** module.
Residential Census Status Report	Now located in the **Reports** module.
Vacancy Report	Now located in the **Reports** module.

Intake/Admission

The Intake/Admission module remains the same and directs users to the *Intake/Admission Search* page.

Profile

The following features are located within the Profile module, as they were previously:

- **Face Sheet**
- **View Waiting Lists** (if set to display)
- **Active/Inactive Roster Status Update** (if set to display - see table below)

Changes to Profile

The Profile features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
ACL OMH Resident Profile Report	No longer available.

Feature	New Location
Face Sheet Report	Now located in the **Reports** module.
Monthly Profile	No longer available.
Program Profile Report	Now located in the **Reports** module. The **Active/Inactive Roster Status Update** feature that was previously available on the Program Profile Report settings page has been moved to the Profile fly-out as a standalone feature (if set to display). Clubhouse programs may have seen this labeled **Clubhouse Roster Status Update**, but going forward the Active/Inactive term will be used in all cases.
ReportBuilders	Now located in the **Reports** module. Search for the following: • Demographics ReportBuilder • Household ReportBuilder • HMIS ReportBuilder • HMIS History ReportBuilder • OASAS ReportBuilder

Transfers

The Transfers module (if it is set to display) remains the same, and directs users to the *Client Transfer* page.

Charts

The Charts modules impacted by menu fly-outs changes are detailed here for your reference. For each there's a list of which features can be accessed from the module's fly-out menu, as well as a table describing other important changes to that module.

Employment

The following features are located within the Employment module, as they were previously:

- **Education/Training**
  - Enrollments, Facilities, Test Scores
- **Jobs**
  - Earnings Report, Employers, Job Bank, Job Interviews, Job Placements, Job Retention Milestones
  - Forms (FormBuilder forms set to display in this location)
- **Permitted Users** (if set to display)

Changes to Employment

The Employment features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Contacts Logs (Employment Service Types only)	Now turned off by default. Can be turned back on by request using the [Menu Fly-Outs Request Form](#).

Feature	New Location
Course Completion Milestones	Now located in the **Reports** module.
Employment Readiness Checklist	No longer available.
Group Notes (Employment Service Types only)	Now turned off by default. Can be turned back on by request using the Menu Fly-Outs Request Form.
Merge Duplicate Employers	No longer available. A new merge tool will be introduced in the future.
Progress Notes (Employment Service Types only)	Now turned off by default. Can be turned back on by request using the Menu Fly-Outs Request Form.
Vocational Rehabilitation Assessment	No longer available.
Worker Bank	Current employment status information is now available from within the **Demographics ReportBuilder** using the **Foothold Report - Consumer Employment Status** saved report format. For specific job placement information, use the **Job Placement ReportBuilder**.
Looking for something else not listed here?	Check the Jobs > **Forms** fly-out. If you don't find it there, contact the Help Desk with the specific feature you are trying to locate.

Entitlements

The following features are located within the Entitlements module, as they were previously:

- **Certified Entitlements**
- **Consumer Identifiers** (if set to display)
- **Homeless Verification** (if set to display)
- **Income Verification** (if set to display)
- **Monthly Allowances** (if set to display)
  - Allowances Report, Create Pending Checks, Entitlement Checks Data, Housing Fees, Monthly Statements
- **Money Management** (if set to display)
- **Permitted Users** (if set to display)

Changes to Entitlements

The Entitlements features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Cash Assistance	No longer available. Consumer In-House Accounts can be used instead.
Consumer In-House Accounts	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form. ★ **Important!** The new "In-House Accounts" data entry/access permission is now required to access this feature.
Entitlement Checks	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form.
Entitlement Notes	Initially shown for agencies who previously chose to display it. Your agency

	may have opted to hide it using the [Menu Fly-Outs Request Form](#).

Hospital

The following features are located within the Hospital module, as they were previously:

- **Advance Directives** (if set to display)
- **Episodes**
- **Hospitalization Referral Letter**
- **Hospitals**

Changes to Hospital

The Hospital features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
ER Utilization	This information is now available in the **Hospital Episodes ReportBuilder** using the **Foothold Report - ER Utilization** saved report format.
Hospital Episodes ReportBuilder	Now located within the **Episodes** feature, and in the **Reports** module.

Incidents

The Incidents module remains the same, and directs users to the Incidents index page.

Medical

The following features are located within the Medical module, as they were previously:

- **Allergies**
- **Contacts**
- **Diagnoses**
- **Diagnostic Tests** (if set to display)
- **Diet Info** (if set to display)
- **Encounters** (if set to display)
- **Family Health History** (if set to display)
- **Functional Status** (if set to display)
- **Immunizations** (if set to display)
- **Laboratory Locations** (if set to display)
- **Laboratory Order**s (if set to display)
- **MAR**
- **Medical Appointment Form**
- **Medical Info**
- **Medications**
- **Procedures** (if set to display)
- **Providers** (if set to display)
- **Support Services Contacts** (if set to display)
- **Vital Signs**

● **Forms** (FormBuilder forms set to display in this location)

Changes to Medical

The Medical features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Child Care	No longer available.
Consents Form	Now turned off by default. Can be turned back on by request using the Menu Fly-Outs Request Form.
Doctor Visit Registration	No longer available.
Insurance	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form.
Medication Monitoring Form	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form.
Verification of Disability	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form.
Looking for something else not listed here?	Check the Medical > **Forms** fly-out. If you don't find it there, contact the Help Desk with the specific feature you are trying to locate.

Outcomes

The following features are located within the Outcomes module, as they were previously:

● **Dashboard**
● **Esign ReportBuilder** (for those with permission)
● **FormBuilder ReportBuilder**
● **Meaningful Use Dashboard** (if set to display)
  – Objectives Report, Quality Measures Report
● **Services Utilization Reports** (for users with access)

Changes to Outcomes

The Outcomes features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Assessment Data	Accessible under **Services - Individual**. It can be turned back on in this secondary location by request using the Menu Fly-Outs Request Form.
Discharge Levels	This information is now available in the **Demographics ReportBuilder** using the **Foothold Report - Discharge Levels** saved report format.
Goal Outcomes Report	Now located in the **Reports** module.
Hospitalization (Rate Report)	Now located in the **Reports** module.

Reception Desk

The following features are located within the Reception Desk module, as they were previously:

- **Group Activities**
- **Program Attendance** (non-residential programs only)

Changes to Reception Desk

The features in the table below have a new location, have to be requested, or are no longer available.

Feature	New Location
Lock Dates	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form. ★ **Important!** The new "Display Lock Dates Button" data entry / access permission is required to access this feature.
Permitted Users	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form. ★ **Important!** The new "Display Permitted Users Button" data entry/access permission is required to access this feature.
Program Log Book	Initially shown for agencies who previously chose to display it. Your agency may have opted to hide it using the Menu Fly-Outs Request Form. ★ **Important!** The new "Display Program Log Book Button" data entry/access permission is required to access this feature.

Services

The Services module has been split into two distinct buttons within the Charts portion of AWARDS: **Services - Group** and **Services - Individual**. Users with access to the former combined Services have access to both new buttons.

Services - Group

The following features are located within the Services - Group module:

- **Group Activities**
- **Group Notes**
- **Group Schedule Setup** (if set to display, for those with permission):
    - Configure Types, Configure Activities, Group Schedules, Group Member Status, Individual Consumer Selection, Group Attendance Form (if set to display)
- **Staff Training** (for those with permission)

Changes to Services - Group

The group Services features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Outreach Mail	Now turned off by default. Can be turned back on by request using the Menu Fly-Outs Request Form.

Services - Individual

The following features are located within the Services - Individual module:

- **Amendments** (if set to display)
- **Assessment Data** (if set to display)
- **Behaviors** (if set to display)
- **Charting Timetable**
- **Consumer Alerts** (if set to display)
- **Contacts Log**
- **Generate BAHN Care Plan** (if set to display)
- **Plans and Reviews** (if set to display)
- **Program Status** (if set to display)
- **Progress Notes**
- **Reachout** (if set to display)
- **Service Coordinators**
- **Service Plans** (if set to display)
- **Service Referrals** (if set to display)
- **Toxicology Information** (if set to display)
- **Utilization Reports**
  - Contact Lapse Audit, Medicaid Services Report (if set to display), Summary of Record Services (if set to display)
- **Forms** (FormBuilder forms set to display in this location)

Changes to Services - Individual

The individual Services features listed here have a new location, have to be requested, or are no longer available.

Feature	New Location
Calendar	Accessible from the **navigation bar**.
Service Contacts ReportBuilder	Now located in the **Reports** module.
Utilization > Caseload Activity Report	Now located in the **Reports** module.
Utilization > Contacts Log Report	Now located in the **Reports** module.
Utilization > Progress Notes Audit Report	No longer available.
Utilization > Progress Notes Report	This information is now available in the Progress Notes ReportBuilder using the **Foothold Report - Progress Notes Utilization** saved format.
Utilization > Service Types on Service Plans	Now located in the **Reports** module. It can be turned back on in this secondary location by request using the Menu Fly-Outs Request Form.
Looking for something else not listed here?	Check the Services - Individual > **Forms** fly-out. If you don't find it there, contact the Help Desk with the specific feature you are trying to locate.

Other Changes

Please take note of the other important changes made to AWARDS as a part of the menu fly-outs project:

- A new **Program** drop-down appears in the top-right corner of the *Home* screen. In some cases you must use this drop-down to select the program to be worked with *before* navigating to the desired feature.

  - ✎ **Note:** The **Program** drop-down on the *Home* screen lists individual programs only. If you need to run a report for a program group or custom grouping, use the **Reports** module. The **Program** drop-down there contains all programs and groupings.

- **FootholdConnect** has moved from the navigation bar to the left-hand menu of the *Home* screen.

- The **Roster Archives** option previously available on Charts module menu pages is now displayed on client selection pages, near the **Client** drop-down or wherever a client selection is made.

- The **A-Z** drop-down previously included on Charts module menu pages is no longer available.

- The **Agency File Cabinet** was previously accessible from both module menu pages and as a module within the Administration portion of AWARDS. The menu page locations have been removed. Any files saved on those menu pages are now stored collectively under Administration > Agency File Cabinet. Please rename or remove any files based on this move, as needed.

  - ☀ **Tip:** If the same agency file cabinet document was previously saved on multiple menus, it will be listed multiple times within the new Agency File Cabinet. Duplicate files can be deleted by users with the "Add/Edit Agency File Cabinet Documents" permission.

  - ✎ **Note:** These changes do not affect the Client File Cabinet, which remains a part of individual face sheets, or the Incidents File Cabinet that can be turned on within incident reports.