



Multi-Step OASAS Admission

AWARDS INSTRUCTION SHEET

Within AWARDS there are several available intake processes and forms. Some intake processes require program staff to complete multiple steps between an applicant's screening and admission. One of those processes is the "multi-step" intake/admission process used by OASAS programs.

Permissions required to complete the multi-step intake/admission process are:

- *PROGRAM CHART ACCESS – You must have chart access to the program associated with the applicant for whom intake/admission is to be processed.*
- *DATA ENTRY / ACCESS – You must have the "Display Any Chart Records Buttons" and the "Display Chart Records Intake Button" permissions in order to access the Intake/Admission module from within which intake/admission is processed. You must also have the "Referrals Data Entry" and "Program Admission/Discharge" permissions in order to process applicant intake/admission.*
- *EXCEPTION OVERRIDES – If you will be completing data entry for former consumers or current consumers who do not have recent admission dates, you must have the "Startup Period Backdating" permission. (This permission expires every 30 days and must be re-assigned after that time if startup data entry is not complete.)*

ABOUT THIS DOCUMENT

This document is intended to guide you through each of the four steps in the multi-step intake/admission process for an OASAS program. Specific topics covered are:

- **Step 1: Creating a Referral Record** – Learn how to create and fill out a consumer referral record. Page **1**
 - **Step 2: Completing OASAS Forms** – Learn how to complete OASAS-required admission forms. Page **5**
 - **Step 3: Processing Consumer Intake** – Learn how to process intake to make a consumer "pending." Page **8**
 - **Step 4: Processing Consumer Admission** – Learn how to fully admit the consumer into the program. Page **10**
 - **Frequently Asked Questions** – Learn the answers to common OASAS intake/admission questions. Page **11**
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STEP 1: CREATING A REFERRAL RECORD

The first step in the intake/admissions process for an OASAS residential or day program is to create a referral record for the consumer.

IMPORTANT! When working with **residential** programs during an agency's start-up period, consumers **MUST** be entered into AWARDS in the following order:

1. **LEGACY CONSUMERS** – Consumers that were both admitted to, and discharged from, an agency program prior to today. This data entry is only necessary if you wish to record a history of previous consumers in your agency/program.

(After processing admission for legacy consumers, you must also fully discharge them within AWARDS before any subsequent intake/admission data entry is done so that the necessary residence units are available. For more information on discharge processing, please see AWARDS Online Help.)

2. **CURRENT CONSUMERS** – Current consumers are those that were admitted to an agency program prior to today, and who have not yet been discharged from that program.
3. **NEW CONSUMERS** – New consumers are those who are screened by and/or admitted into any agency program today or any time in the future.

To create a referral record, complete the following steps:

1. From the AWARDS Opening Menu page, click **Consumer Lookup**. The Consumer Lookup page is displayed. →

Each agency refers to its members/consumers in a different way, and the terminology in AWARDS can be adjusted accordingly. As a result, the Consumer Lookup button may be labeled Client Lookup, Member Lookup, Resident Lookup, or something similar. Regardless of how it is labeled, the functionality behind the button is the same as that described in this document.

2. In the **First Name** and **Last Name** fields, type the first two letters of the consumer's first and last names, respectively.
3. Click the **Limit Search Results** to drop-down arrow and select the number of matches to be displayed in the lookup results.
4. Click **SEARCH**. The *Consumer Lookup Results* page is displayed. This page contains a list of consumers with records in the system for whom all or part of the identifying information entered on the previous page is a match.
5. If there is an existing record for the consumer, take note of how the name, date of birth, and social security number were entered for him or her. This information will need to be entered in the exact same manner when creating the referral, so that a duplicate program record is not created.

6. Click **Intake/Admission Menu**. The *Intake Records Search* page is displayed. →
7. Click the **Program** drop-down arrow and select the program associated with the consumer for whom the referral is to be created.
8. Click the **Database** drop-down arrow and select "Data Entry."
9. In the **First Name**, **Last Name**, and/or **Alias** fields, type the consumer's name, initials, and/or alias. When using full names or identifiers such as SSNs, be sure to enter that information exactly as it was found in any existing records in step 5, if applicable.

10. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed. →

Sample Program Referral Search Results										
Referral Source Type: All Sources Referrals Screened From 01/01/2000 to 03/10/2009 Name = * * Sorted by Applicant Application Status: <i>all undecided dispositions -all resolved outcomes -</i>										
Screened	Applicant	Status	Updated	Program	Eligibility	Source	Forms Received	Days Open	Admission Date	Discharge Date
?	Create New Application	Screening	?	Sample Program						
03/20/2003	Bull Frog	Accepted-Admission	03/20/2003	Sample Program	Undetermined Eligibility	Self-A.W.A.R.D.S. Demo	03/20/2003	0	03/20/2003	03/01/2009
05/19/2003	Rabbit Green	Accepted-Admission	06/18/2003	Sample Program	Undetermined Eligibility	Self-A.W.A.R.D.S. Demo		No Date for Forms Received	06/18/2003	

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This page contains a list of any existing intake records for which the identifying information matches that entered on the *Intake Records Search* page.

Click the heading of any column in the results table to sort the contents by that variable.

11. In the search results, check to see if the consumer has an existing referral record. Based on your findings do one of the following:
- If the consumer has an existing referral with an admission date and no discharge date, he or she is currently on the program roster and a new admission should not be processed.
 - If the consumer has an existing referral with no admission date and with screening and status dates for a program admission other than the one you are recording, continue with step **12** to create a new referral.
 - If the consumer has an existing referral with no admission date and with screening and status dates for the program admission you are recording, it should be used to process the consumer's admission. Skip the remainder of the referral creation process to prevent a duplicate record, and instead continue with "Step 3: Processing Consumer Intake" on page 8, or "Step 4: Processing Consumer Admission" on page 10.
 - If the consumer does not have an existing referral record, continue with step **12**.

12. From the "Applicant" column, click **Create New Application**. The *Referral Information Form* page is displayed. →

13. Complete the application evaluation portion of the referral by configuring the fields and options on this page as necessary. If, in step 5, an existing record was found for the consumer, be sure to enter in this form the same name, date of birth, and social security number used in that record.

Keep in mind when setting the Intake Status option on this page that in order

Sample Program Referral Information Form Application Evaluation: New Applicant			
* Indicates Required Fields			
*First Name:	*Last Name:	Suffix:	Alias:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Birthdate:	*Social Security #:	*SSN Data Quality:	Gender:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Referred By: <input type="text" value="To be determined after referral is created"/>			
*Screening Date:	Screeners:		Forms Received Date:
03/10/2009 <input type="text"/>	<input type="text"/> <input type="text"/>		<input type="text"/>
*Status Date:	*Intake Status:		
03/10/2009 <input type="text"/>	<input type="text"/>		
Program Placement: <input type="text" value="Sample Program"/>			

to process consumer admission the intake status must be set to "Accepted-Admission." If intake is to be processed for this consumer prior to admission, an unresolved intake status must be selected. (Resolved status selections are "Accepted," "Withdrawn," and "Rejected.")

For more detailed information on the fields and options on the Referral Information Form page, please see AWARDS Online Help.

14. Click **CREATE REFERRAL**. The application evaluation is saved, and a read-only report version of the full referral record is displayed on the *Referral Information Form* page.

If any data entry errors are found by AWARDS at any point during the process of creating or updating a referral record, they are listed in red at the top of the page. In the event that an error is received, update the portion of the referral to which the error applies, then save your work before proceeding.

15. Click **UPDATE REFERRAL SOURCE**. The *Referral Source Selection Settings* page is displayed.

Referral source information must be entered before intake or admission can be processed for a referral.

16. Click one of the "Referred By" radio buttons on this page to indicate who referred the applicant:

- **Self** - If the client was self-referred, click this radio button and continue with step **18**.
- **Agency** - If the client was referred by another agency, click this radio button and continue with step **19**.

17. Click **CONTINUE**. The referral source information is saved and the *Referral Information Form* page is re-displayed. Continue with step **25**.

18. To limit agency selection by name, type the first letter of the agency's name in the **Agency/Initial** field. If this field is left blank, all agencies will be included in the referral source selection process.

19. Click **CONTINUE**. The *Referral Source Agency Selection* page is displayed.

20. Click the agency drop-down arrow and select the referring agency. If the referring agency is not listed, select "Add New Agency."

The referring agency list is shared by all programs using AWARDS. If a new agency is added to this list using the "Add New Agency" selection, that agency will be available for selection as a referral source by all programs moving forward. Likewise, if an existing agency is selected here and changes are made to its information in later steps in this process, those changes will be seen by all programs.

21. Click **CONTINUE**. The *Referral Source Agency & Contact Update* page is displayed.

22. Make changes or additions to the referring agency information as necessary using the following fields and options: **Agency** (name), **Program Type**, **Street Address**, **City**, **State** and **Zip** (code).

23. Make changes or additions to the contact person at the referring agency as necessary using the following fields and options: **Name**, **Phone**, **Title**, and **Phone/Fax Number**.

If the appropriate individual is not listed in the Contact Person selection list, select "Add new Contact Person" and enter his or her information in the fields below.

24. Click **APPLY CONTACT UPDATE & CONTINUE REFERRAL UPDATE**. The *Referral Information Form* page is displayed.

25. Make additional changes or additions to the referral record by configuring the fields and options in one or more of the following record sections:

- **Application Evaluation**
- **Demographic Data**

To access a section, click the corresponding **Update** button. An *Update* page is displayed. When all of the information in that section has been entered or updated as necessary, click **UPDATE** to save your information and return to the *Referral Information Form* page.

For more detailed information on the fields and options in these referral record sections, please see AWARDS Online Help.

The process of creating and updating a new referral is complete.

STEP 2: COMPLETING OASAS FORMS

OASAS requires several forms to be completed for each consumer prior to admission – the Initial Determination, LOCADTR, Legal Data, Medical Information, and Admission Decision. To fill out those forms, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Records Search* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom OASAS forms are to be completed.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. 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.
5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.
6. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

Some agencies may also be able to search by other identifying information, such as social security number.

- **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 those referrals with screening dates in the range entered here are included in the search results.
7. From the "Applicant" column, click the name of the consumer for whom the OASAS forms are to be completed. The *Referral Information Form* page is displayed.

Each of the required OASAS forms can be accessed using a button in the middle of this page. ➤

The screenshot shows a web interface for the 'Referral Information Form'. At the top, there is a button labeled 'Update Application Evaluation'. Below it, there are three buttons: 'Initial Determination', 'Admission Decision', and 'Process Admission'. In the center, the text 'Demographic Info: Sample Client' is displayed. At the bottom, there are three buttons: 'Legal Data', 'Medical Information', and 'LOCADTR'.

- Complete each OASAS form by clicking the corresponding button on the *Referral Information Form* page, configuring the fields and options on that form, and then updating to save your data. Repeat this step until all four forms are filled out.

For detailed information on completing step 8 for a specific form, please refer to the sub-section for that form in the pages that follow.

- [Initial Determination](#) - Page 6
- [Legal Data](#) - Page 7
- [Admission Decision](#) - Page 8
- [LOCADTR](#) - Page 6
- [Medical Information](#) - Page 8


The forms do not need to be completed in any particular order. These forms are either required by OASAS, or contain data fields that enable AWARDS to populate the OASAS PAS-44 report. Many of the required fields on the Process Admission page also populate the PAS-44 which can be accessed using the Fiscal/Program module OASAS Reports feature. (Based on database configuration, some programs may also have the OASAS Reports feature accessible to them within the Discharge module.)

The process of filling out required OASAS forms is now complete. Continue with "Step 3: Processing Consumer Intake" on page 8, or "Step 4: Processing Consumer Admission" on page 10, as appropriate.

Intake processing is used when it is necessary to begin entering data outside of the referral record prior to the consumer's admission; for example, within the face sheet. Admissions processing is used to fully admit the consumer into the program.

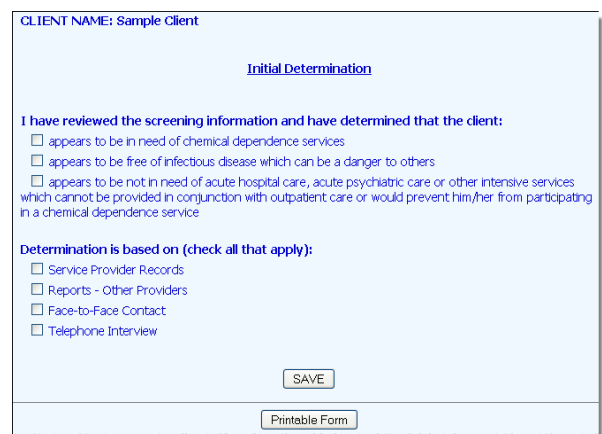
INITIAL DETERMINATION

To fill out a consumer's Initial Determination form, complete the following steps from within his or her referral:

- Click **Initial Determination**. The initial determination data entry form is displayed. 
- Check off the appropriate responses for each of the two questions on the form.
- Click **SAVE**. A printable confirmation page is displayed.

The process of filling out an Initial Determination form is now complete.

Click [Referral Form](#) to return to the consumer's Referral Information Form page.



CLIENT NAME: Sample Client

[Initial Determination](#)

I have reviewed the screening information and have determined that the client:

- ☐ appears to be in need of chemical dependence services
- ☐ appears to be free of infectious disease which can be a danger to others
- ☐ appears to be not in need of acute hospital care, acute psychiatric care or other intensive services which cannot be provided in conjunction with outpatient care or would prevent him/her from participating in a chemical dependence service

Determination is based on (check all that apply):


- ☐ Service Provider Records
- ☐ Reports - Other Providers
- ☐ Face-to-Face Contact
- ☐ Telephone Interview

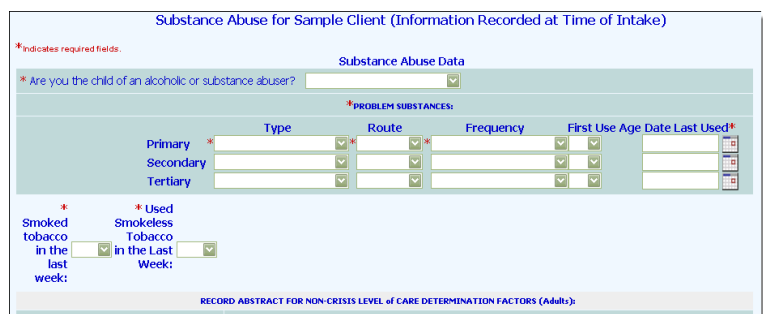
SAVE

Printable Form

LOCADTR

To fill out a consumer's LOCADTR form, complete the following steps from within his or her referral:

- Click **LOCADTR**. The *Substance Abuse* page is displayed. 
- Click the **Are you the child of an alcoholic or**



Substance Abuse for Sample Client (Information Recorded at Time of Intake)

*Indicates required fields.

Substance Abuse Data

* Are you the child of an alcoholic or substance abuser?

	Type	Route	Frequency	First Use Age	Date Last Used*
Primary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secondary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tertiary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

* Smoked tobacco in the last week: ☐

* Used Smokeless Tobacco in the Last Week:

RECORD ABSTRACT FOR NON-CRISIS LEVEL of CARE DETERMINATION FACTORS (Adults):

substance abuser? drop-down arrow and select from the following options: "No," "Child of alcoholic(s)," "Child of substance abuser(s)," or "Both COA and COSA."

- In the "Problem Substances" portion of the page, use the following fields and options to enter information on the consumer's Primary, Secondary, and Tertiary problem substances as appropriate:
 - Type** – Click this drop-down arrow and select the substance type.
 - Route** – Click this drop-down arrow and select the route of usage.
 - Frequency** – Click this drop-down arrow and select when and how frequently the substance was used.
 - First Use Age** – Click this drop-down arrow and select the age at which the substance was first used.
 - Date Last Used** – In this field, type the date of last use for the substance (using mm/dd/yyyy format).
- Click the drop-down arrows next to the questions regarding tobacco use and select "Yes" or "No" for each.
- In the "Record Abstract for Non-Crisis Level of Care Determination Factors" portion of the page, click the check box next to each factor that applies to the consumer.

If a numbered factor is selected that has lettered sub-selections, at least one of those sub-selections must also be checked off.

- When the abstract is complete, click **CONTINUE**. The Substance Abuse page is displayed. →

This page contains the "Non-Crisis Level of Care Determination" table with a decision tree containing an indicated level of care based on the answers given in the abstract. The Indicated Level of Care field at the bottom of the decision tree is automatically filled in based on the result of the determination table.

Substance Abuse for Sample Client (Information Recorded at Time of Intake)	
NON-CRISIS LEVEL OF CARE DETERMINATION (Adults):	
LOCADTR Criteria	Indicated Level of Care
1. Dependence condition or abuse condition	<input type="radio"/> yes, continue <input checked="" type="radio"/> no, go to #15
2. Unable to participate in or comply with treatment outside 24-hour structured treatment setting	<input type="radio"/> yes, go to #4 <input type="radio"/> no, continue
3. Imminent health risk from continued alcohol or drug use	<input type="radio"/> yes, continue <input type="radio"/> no, go to #6
4. Substantial deficits in functioning skills	<input type="radio"/> yes, go to #5 <input type="radio"/> no --> Inpatient Rehabilitation
5. Complications or comorbidities requiring medical management/monitoring daily	<input type="radio"/> yes --> Inpatient Rehabilitation <input type="radio"/> no --> Intensive Residential Rehabilitation

- If necessary, enter any additional comments or factors that argue against the indicated level of care in the appropriate text areas on the lower portion of the screen.

*To print the entire Substance Abuse page, including any "Primary," "Secondary," and "Tertiary" information entered on the first page, click **Printable Form**.*

- Click **SAVE**. The Referral Information Form page is displayed.

The process of completing the LOCADTR is now complete.

LEGAL DATA

To fill out a consumer's Legal Data form, complete the following steps from within his or her referral:

- Click **Legal Data**. The Court Cases Information page is displayed. →

Court Cases Information for Test Consumer	
*Indicates required fields.	
Legal Data	
*Criminal Justice Status:	<input type="checkbox"/> None <input type="checkbox"/> Probation <input type="checkbox"/> Parole <input type="checkbox"/> Work Release <input type="checkbox"/> In Prison/Jail <input type="checkbox"/> In OCPS Facility <input type="checkbox"/> Charges Pending <input type="checkbox"/> Any Treatment or Specialty Court <input type="checkbox"/> Other
*Alternative to Incarceration:	<input type="text"/>
*No. of Arrests 30 Days Pre-Admission:	<input type="text"/>
NYSID #:	<input type="text"/>
Criminal Justice Consent Date:	<input type="text"/>
Criminal Justice Consent Revocation Date:	<input type="text"/>
DURING THE SIX MONTHS PRIOR TO ADMISSION:	
* a. How many times have you been arrested?	<input type="text"/>
* b. How many days have you been incarcerated?	<input type="text"/>
Have you ever been arrested for a violent crime, such as assault, armed robbery, gun or weapon possession, arson, homicide. (check all that apply)	
Do you have any of the following open cases? (please check all that apply)	

2. Configure the fields and options on this page as necessary. Required fields/options are noted with a red asterisk (*).
3. Click **SAVE**. The form data is saved and the *Referral Information Form* page is displayed.

The process of filling out a Legal Data form is now complete.

MEDICAL INFORMATION

To fill out a consumer's Medical Information form, complete the following steps from within his or her referral:

1. Click **Medical Information**. The *Medical Information* page is displayed. →
2. Configure the fields and options on this page as necessary. Required fields/options are noted with a red asterisk (*).
3. Click **SAVE**. The form data is saved and the *Referral Information Form* page is displayed.

The process of filling out a Medical Information form is now complete.

ADMISSION DECISION

To fill out a consumer's Admission Decision form, complete the following steps from within his or her referral:

1. Click **Admission Decision**. The admission note data entry form is displayed.

The content of this portion of the Admission Note is based on the type of OASAS program being worked with; for example, outpatient services, supportive living, and so on.

2. Configure the fields and options on this page as necessary.
3. If necessary, in the **Comments** text box type any admission comments for the consumer.
4. If the consumer is not being admitted, type any comments/reasons for that in the **If this person is not admitted, it is for the following reasons(s)** text box.
5. Click **SAVE**. A printable confirmation page is displayed.

The process of filling out an Admission Decision form is now complete.

Click **Referral Form** to return to the consumer's Referral Information Form page.

STEP 3: PROCESSING CONSUMER INTAKE

*It is not always necessary to process consumer intake. This step in the intake/admissions process should be completed if it is necessary to begin entering data outside of the referral record prior to the consumer's admission; for example, within the face sheet. Programs using this step will see a **Process Intake** button near the **Process***

Admission button on the Referral Information Form page. If this step is not required, skip ahead to “Step 4: Processing Consumer Admission” on page 10.

To process consumer intake, complete the following steps:

1. From the AWARDS Opening Menu page, click **Intake/Admission**. The *Intake Records Search* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer for whom intake is to be processed.
3. Click the **Database** drop-down arrow and select “Data Entry.”
4. Intake is processed from within the consumer’s referral record. In order to access referral records, 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.

Some agencies may also be able to search by other identifying information, such as social security number.

- **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 those referrals with screening dates in the range entered here are included in the search results.
5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.
 6. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

Click the heading of any column in the results table to sort the contents by that variable.

7. From the “Applicant” column, click the name of the consumer for whom intake is to be processed. The *Referral Information Form* page is displayed.
8. Review the applicant’s referral, and verify that:
 - **Referral source information has been entered** - Referral source information must be entered before intake can be processed.
 - **The correct referral status has been selected and an interview has been scheduled** – The referral Intake Status must be set to indicate that an interview has been scheduled for the applicant; for example “1st Intake Interview.” The Interviewers portion of the referral form must also be used to schedule an interview prior to intake processing.

9. Click **Process Intake**. The *Process Intake* page is displayed. →

If a consumer record already exists for this applicant, information from that record defaults to the fields on this page. If a consumer record does not exist, information such as first and last name

Sample Program
Process Intake
Process Intake Information: **Sample Client**

* Indicates Required Fields

*First Name: Sample	*Last Name: Client	Suffix: 	*Gender: [v]
*Social Security #: 	*SSN Data Quality: [v]	*Birthdate: 	*Intake Date: 03/10/2009 [calendar icon]
*Residence Prior to Program Entry: [v]			
Previous Living Situation: [v]	Homeless: [v]	Housing Needy: [v]	

UPDATE Intake Menu
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defaults from his or her referral record.

10. Configure the fields and options on the *Process Intake* page as necessary. Required fields are noted with a red asterisk (*).

For more detailed information on these fields and options, please see AWARDS Online Help.

11. Click **UPDATE**. The consumer's intake is processed, and his or her face sheet is displayed on the *Consumer Face Sheet* page.

For more information on working with consumer face sheets, please see AWARDS Online Help.

The intake process is now complete. Continue with "Step 4: Processing Consumer Admission."

*Once intake has been processed for an applicant, he or she is listed as "**pending" in consumer drop-down selection lists throughout AWARDS, and is available for data entry in several areas: face sheet, reception desk, charting timetable, and the Calendar (for individual consumer events). Group notes and progress notes may also be written for a pending consumer if an option has been set behind-the-scenes in AWARDS to allow for it. Keep in mind that while pending consumers are available for data entry in several areas, they are not included in many reports; for example, the Demographics and Program Profile Reports both exclude pending consumers.*

STEP 4: PROCESSING CONSUMER ADMISSION

To process a consumer admission, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Records Search* page is displayed.
2. Click the **Program** drop-down arrow and select the program associated with the consumer to be admitted.
3. Click the **Database** drop-down arrow and select "Data Entry."
4. Admission is processed from within the consumer's referral record. In order to access referral records, 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.

Some agencies may also be able to search by other identifying information, such as social security number.

- **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 those referrals with screening dates in the range entered here are included in the search results.

5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.
6. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

Click the heading of any column in the results table to sort the contents by that variable.

7. From the "Applicant" column, click the name of the consumer for whom admission is to be processed. The *Referral Information Form* page is displayed.

8. Review the consumer's referral record, and verify that:

- **Referral source information has been entered** – Referral source information must be entered before admission can be processed.
- **The correct referral status has been selected** – The Intake Status must be set to "Accepted – Admission."

9. Click **Process Admission**. The *Process Admission* page is displayed. →

10. Configure the fields and options on this page as necessary. Required fields / options are noted with a red asterisk (*).

Sample Program
Process Admission
Process Admission Information: Sample Client

* Indicates Required Fields

*First Name: Sample	*Last Name: Client	Suffix:	*Gender: [dropdown]
*Social Security #: 999-00-9999	*SSN Data Quality: Full SSN reported [dropdown]	*Birthdate:	
*Intake Date: 03/10/2009 [calendar]	*Admission Date:	*Primary Worker: [dropdown]	*Residence: [dropdown]

When completing this page, please remember that the Admission Date must be on or after the Intake Date. For detailed information on the other fields and options on the Process Admission page, please see AWARDS Online Help.

11. Click **UPDATE**. The consumer's admission is processed, and his or her face sheet is displayed on the *Consumer Face Sheet* page.

For more information on working with consumer face sheets, please see AWARDS Online Help.

The multi-step OASAS admission process is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the multi-step OASAS intake/admission process can be a useful reference when you have your own questions about the process.

HOW DO I GET A WIDER RANGE OF INTAKE/ADMISSION DATES TO CHOOSE FROM?

In order to backdate intake or admission, the "Startup Period Backdating" permission is required. This permission, which is assigned using the System Setup module Permissions Maintenance feature, enables the user to type in an intake or admission date rather than select one from a list of recent dates.

WHAT DOES THE ERROR "INTAKE DATE BEFORE REFERRAL SCREENING DATE" MEAN?

A client's screening date must be the same as, or prior to, a client's intake date. In the event that the intake date is set to something before the screening date, an error message will be generated prompting the user to make a correction.

WHAT IS THE DIFFERENCE BETWEEN PROCESS INTAKE AND PROCESS ADMISSION?

Process Intake is an optional and intermediate step in the admissions process. It places the client into a program as "pending" to enable users to begin entering data for the client outside of the referral record prior to his or her admission, but the client is not officially added to the roster of the program or placed within a residence unit at the program (if applicable).

Once intake has been processed for an applicant he or she is available for data entry in several areas: face sheet, reception desk, charting timetable, and the Calendar (for individual consumer events). Group notes and progress notes may also be written for a pending client if an option has been set behind-the-scenes in AWARDS to allow for it. Keep in mind that while pending clients are available for data entry in several areas, they are not included in many reports; for example, the Demographics and Program Profile Reports both exclude pending clients.

Process Admission fully places the client into the program. Once admission is processed the client is included on the current roster for that program, is placed into a residence unit (if applicable), and data entry can be completed in all portions of his or her records. He or she will also appear on reports throughout the system.

WHAT SHOULD THE DEMOGRAPHICS SECTION'S "MOVE IN DATE" FIELD CONTAIN?

The address and move in date information on the referral form is meant to capture where the client was living at the time of admission and the date on which he or she moved into that residence. As a result, the move in date should always be prior to the client's program admission date.

WHY ARE REFERRALS MISSING FROM THE RESULTS WHEN I SEARCH BY DATE RANGE?

When you search with a date range, the system sorts the matches alphabetically, but the records are not retrieved by name. Instead, it is looking for the X most recent referrals (where X is the number of matches you have elected to display) with screening dates between the start and end date you set in the date range. As a result, if the number of matches is not set high enough, some older referrals may be left off the search results even if they fall within the set date range and the client names are early in the alphabet. To ensure that the search results include all applicable referrals, select a high value for the "Limit Search Results to" option on the *Intake Records Search* page.

WHY CAN'T I CHANGE THE STATUS OF A "WITHDRAWN" OR "REJECTED" REFERRAL?

Once a referral has been set to "Withdrawn" or "Rejected" changes can no longer be made to the status of that referral. If such a change is required, please contact the Help Desk for assistance. Be sure to provide them with the name of the client and program in question, the date on the referral you are working with, as well as the status to which the referral should be changed.

WHY WASN'T THE DATE RANGE APPLIED WHEN I SEARCHED FOR REFERRALS?

The intake search uses either a name OR a date range, not both. If both are entered, the date range will be ignored.