



## Multi-Step OASAS Admission – Outpatient (822)

### AWARDS INSTRUCTION SHEET

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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 outpatient (822) OASAS programs.

*For information on processing an intake/admission for a residential OASAS program, please see the "Multi-Step OASAS Admission – Residential" instruction sheet.*

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### REQUIRED PERMISSIONS

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

- **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.)

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### 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 outpatient OASAS program. Specific topics covered are:

- **Creating a Referral Record** – Learn how to create and fill out a consumer referral record. Page **2**
- **Completing OASAS Forms** – Learn how to complete OASAS-required admission forms. Page **5**
- **Processing Consumer Intake** – Learn how to process intake to make a consumer "pending." Page **7**
- **Processing Consumer Admission** – Learn how to fully admit the consumer into the program. Page **8**
- **Processing Household Setup** – Place pending or admitted clients into households. Page **10**
- **Frequently Asked Questions** – Learn the answers to common OASAS intake/admission questions. Page **13**

## CREATING A REFERRAL RECORD

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

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 and household members 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 being admitted, 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: all undecided dispositions - all resolved outcomes -

Screened	Applicant	Status	Updated	Program	Eligibility	Source	Forms Received	Days Open	Admission Date	Discharge Date
?	<a href="#">Create New Application</a>	Screening	?	Sample Program						
03/20/2003	<a href="#">Bull Frog</a>	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	<a href="#">Rabbit Green</a>	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 "Processing Consumer Intake" on page 7, or "Processing Consumer Admission" on page 8.
- 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.

Sample Program  
Referral Information Form  
Application Evaluation: New Applicant

\* Indicates Required Fields

\*First Name: [Text Box] \*Last Name: [Text Box] Suffix: [Text Box] Alias: [Text Box]

Birthdate: [Text Box] \*Social Security #: [Text Box] \*SSN Data Quality: [Dropdown] Gender: [Dropdown]

Referred By: [Text Box] To be determined after referral is created

\*Screening Date: [Text Box] Screeners: [Dropdown] Forms Received Date: [Text Box]

\*Status Date: [Text Box] \*Intake Status: [Dropdown]

Program Placement: [Text Box] Sample Program [Dropdown]

*Keep in mind when setting the*

*Intake Status option on this page that in order 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 **17**.
- **Agency** - If the client was referred by another agency, click this radio button and continue with step **18**.
- **Other** - If the client was referred in another way, click this radio button and continue with step **17**.

17. Click **CONTINUE**. The referral source information is saved and the *Referral Information Form* page is re-displayed. Continue with step **21**.

18. Click the **Referral Agency** drop-down arrow and select the source agency.

*The agency selection list includes those agencies specified for inclusion as "Admission Referral Sources" in the System Setup module's Referral Agencies feature. New referring agencies and contacts cannot be added from within a referral/admission record. If it is necessary to have an addition made and you do not have access to the Referral Agencies feature, contact your local Help Desk for assistance. They can help you or put you in touch with someone with the necessary access.*

To first narrow the contents of the selection list, type the first few letters of the agency's name or street address in the corresponding **Search** field.

19. Once an agency has been selected, the **Referral Contact** drop-down list is automatically refreshed to reflect those contacts saved for that agency (within the Referral Agencies feature), along with an "Unknown" option. Click this drop-down arrow and select the applicable contact name for the referral source.

20. 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.

## COMPLETING OASAS FORMS

OASAS requires certain forms within AWARDS to be completed for each consumer prior to admission – Legal Data, and Medical Information. 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.

*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 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. →

8. 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 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.

- [Medical Information - Page 6](#)

- [Legal Data - Page 6](#)

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.)

Admissions processed prior to 8/1/2015 will also have access to a LOCADTR 2.0 button [here](#), which opens the form used for admission. Admissions with admission dates on or after 8/1/2015 will have LOCADTR information housed in the LOCADTR 3.0 tool, located [here](#).

The process of filling out required OASAS forms is now complete. Continue with “Processing Consumer Intake” on page 7 or “Processing Consumer Admission” on page 8, as appropriate.

Intake processing 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.

## LEGAL DATA

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

1. Click **Legal Data**. The *Court Cases 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 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.

## PROCESSING CONSUMER INTAKE

This step in the intake/admissions process is necessary to begin entering data outside of the referral record prior to the consumer's admission, such as fields on the face sheet, or to record preadmission billable services, such as progress notes. Programs using this step will see a **Process Intake** button near the **Process Admission** button on the Referral Information Form page.

*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.*

After processing a client's intake, all billable services for the client, including preadmission services, should be recorded within the Progress Notes feature of the Services module. Most programs will see an 822 Admission Assessment template on the Progress Notes settings page when creating a new note, but configuration may vary.

*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.*

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** – The referral Intake Status must be set to an unresolved status selection in order to process intake. (Resolved status selections are “Accepted,” “Withdrawn,” and “Rejected.” Any other status selection can be used for 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 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.*

*Admissions with admission dates on or after 8/1/2015 will have LOCADTR information housed in the LOCADTR 3.0 tool, located [here](#). Enter the results in the **LOCADTR Final Level of Care** field on the admission form.*

11. Click **UPDATE**. The consumer's intake is processed, and his or her face sheet is displayed on the *Consumer Face Sheet* page if the program does not collect household information. If the program is set to collect household information, the *Household Composition* page is displayed, skip to “Processing Household Setup” on page 10.

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

The intake process is now complete.

## 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.

- Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.
- 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.*

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

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

- 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: [Dropdown]	
*Intake Date: 03/10/2009 [Calendar]	*Admission Date: [Calendar]	*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.*

*Admissions with admission dates on or after 8/1/2015 will have LOCADTR information housed in the LOCADTR 3.0 tool, located [here](#). Enter the results in the **LOCADTR Final Level of Care** field on the admission form.*

- Click **UPDATE**. The consumer’s admission is processed, and his or her face sheet is displayed on the *Consumer Face Sheet* page if the program does not collect household information. If the program is set to collect household information, the *Household Composition* page is displayed, skip to “Processing Household Setup” on page 10.

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

The multi-step OASAS admission process is now complete.

## PROCESSING HOUSEHOLD SETUP

Once an intake or admission is processed in a program that collects household information, users are redirected to the *Household Composition* page and must place the newly admitted client into a household.

To complete the household setup for a newly admitted client, complete the following steps:

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

If the client is currently NOT in a household, continue to step 2.

If the client is currently IN a household, skip to step 3.

2. If the client is currently not in a household and should be placed in a new household, select **Create a new Household**. This option creates a brand new household in AWARDS, and places the client into the household as the primary client. Continue with step 4. →

If the client is currently not in a household and should be placed in an existing household in AWARDS, select **Join an existing Household** and continue to step 5.

3. The household composition of the client's current household is displayed. To confirm the client's placement in that household select **Client should remain in their current household** and skip to step 13. →

First Name	Last Name	Date of Birth	SSN	Relation to Primary Client
Medium	City	05/15/2001	999-99-9999	Self
Small	City	05/16/2005	999-99-9999	Brother
Mary	Contrary	09/08/1964	999-99-9999	Mother
Big	City	01/15/1975	999-99-9999	Father

To remove the client from the current household and place him or her in a different household, select **Remove Client from current household and create/join a new household** and click **CONTINUE**. The client is removed from the household and an updated *Household Composition* page is displayed, asking the user to create a new household or have the client join an existing one. Go up to step 2 to complete this page.

4. In the **Start Date** field, type the date on which the client became associated with the household, or use the date picker on the right.
5. Click **CONTINUE**. If the client is joining an **existing** household, the *Household Search* page is displayed, continue with step 6.

If the client is entering a **new** household, AWARDS generates a new Household ID for the household and the *Household Composition* page is displayed asking, **Would you like to add another member to this household?**

- To add another household member to the household, select the **Yes** radio button and click **CONTINUE**. The *Household Search* page is displayed. Please refer to the "[Household Composition Instruction Sheet](#)" in Online Help for the detailed procedure of "Adding a New Household Member" on page 5. At this point, begin with step 4 in that section.
- If no further household members should be added to the household, select the **No** radio button and click **CONTINUE**. The *Household Composition* page is displayed. The household setup is now complete.

*If any intake or admission information needs to be updated, click the green check next to the client's name and the admission form is displayed in data entry mode.*

6. On the *Household Search* page, enter the **First Name, Last Name** or **SSN** of an existing household member of the household the client is joining.
7. Click the **Limit Search Results to** drop-down arrow and select the number of matches that should be displayed in the search results.

8. Click **CONTINUE**. The *Household Search Results* page is displayed. This page contains a list of consumers and household members with records in the system for whom all or part of the identifying information entered on the previous page is a match.

**Senior Center**  
**Household Search Results**  
**Tanya Able**

Search Criteria  
Last Name: tr

The following results were found.  
Please select one of the following households to join.

	First Name	Last Name	Program History(s)	Household ID	Primary Client	Active Members	
<input type="radio"/>	Dave	Treatment	Continuing Day Treatment One - 11/12/2004	1085	Treatment, Dave	0	<a href="#">View</a>
<input type="radio"/>	Dick	Tracy	Emergency Shelter Program - 02/05/2007	1140	Tracy, Dick	0	<a href="#">View</a>

**Living With Household**   **\*Relation to Primary Client**   **\*Start Date**   **End Date**  
☒ Yes   ☐ No   
    
    
   

\* Indicates Required Fields

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9. Locate the household the client is joining, and click the radio button next to that household on the search results table.

*To see the details of a household on the table, click the **View** link and the Household Composition page for that household is displayed in a pop-up window over the search results page. From there, you can choose to **Edit Household Composition** of that household or **Close**.*

10. Beneath the table of search results, in the **Living With Household** field, 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. The "Yes" radio button is selected by default.
11. Click the **Relation to Primary Client** drop-down and select the relationship that describes the new household member in regards to the household's primary client, listed in the table.
12. In the **Start Date** field, type the date that the new household member became a member of the household, or use the date picker to the right.

*Determining when a member "joins a household" is defined by each individual program. Residential programs may define this as the date the household member moved in with the primary client. Non-residential programs may define this as the date the household member became a member of the household, regardless of when agency services began. Due to this flexibility, this date is not tied to a program admission date or residential move in date.*

13. Click **CONTINUE**. If a child was added, you may be taken to another household info form to collect additional data on the newly added household member; otherwise the *Household Composition* page is displayed, showing the household composition and a question is displayed asking, **Would you like to add another member to this household?** →

- To add another household member to the household, select the **Yes** radio button and click **CONTINUE**. The *Household Search* page is displayed. Please refer to the “[Household Composition Instruction Sheet](#)” in Online Help for the detailed procedure of “Adding a New Household Member” on page 5. At this point, begin with step **4** in that section.

**Senior Center**  
**Household Composition**  
**Household ID: 1085**  
**Tanya Able**

First Name	Last Name	Date of Birth	SSN	Relation to Primary Client
Dave	Treatment	05/05/1980	999-99-9999	Self
Tanya	Able	01/15/1955	999-99-9999	Spouse

**Would you like to add another member to this household?**

☐ Yes ☐ No

- If no further household members should be added to the household, select **No** and continue with step **14**.

14. Click **CONTINUE**. The *Household Composition* page is displayed. If all household members have program admissions in the program, the household setup process is now complete.

If there are household members that are not currently admitted into the program, a question is displayed asking, **Would you like to admit a household member into this program?** →

- If one of the household members displayed in the table should be admitted into the program, select the radio button next to his or her name and click **CONTINUE**. A pre-populated referral form is displayed for the selected program. Use this form to begin the admission process for the household member being admitted into the program.
- If no other household members are to be admitted into the program, click either the **FACESHEET** or **Opening Menu** button to navigate away from this page as desired. The household setup process is now complete.

**Senior Center**  
**Household Composition - Admissions**  
**Household ID: 1085**  
**Tanya Able**

**Would you like to admit a household member into this program?**

	First Name	Last Name	Date of Birth	SSN	Relation to Primary Client
<input type="radio"/>	Dave	Treatment	05/05/1980	999-99-9999	Self
<input checked="" type="radio"/>	Tanya	Able	01/15/1955	999-99-9999	Spouse

## 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 CAN I ACCESS INITIAL DETERMINATION AND ADMISSION DECISION INFORMATION FOR ADMISSIONS DATED PRIOR TO JULY 1, 2011?

As a result of regulatory changes in July 2011, the required “Initial Determination” and “Admission Decision” forms that were displayed on the *Referral Information* page in the Intake/Admission module were removed for all intakes/admissions dated July 1, 2011 or later. The forms will continue to display on intakes/admissions done prior to

July 1, 2011 in order for users to access previously entered data. So users will still have access to this data on the *Referral Information* page.

## 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.

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## 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. Help Desk users with access to the Program History Corrections feature can open the necessary field by following the "[Changing a 'Withdrawn' or 'Rejected' Intake Status](#)" procedure outlined in Online Help. Be sure to provide the Help Desk 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.

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## WHY CAN'T I FIND A REFERRAL I CREATED FOR A CLIENT IN A PROGRAM GROUPING SUCH AS "ALL HOUSING PROGRAMS" OR "ALL EMPLOYMENT PROGRAMS?"

Only users who have chart access to all of the programs in a particular program grouping can see referrals to the program grouping. Therefore, it is recommended that all referrals be made for specific programs.

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## 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.