Central Intake

AWARDS Instruction Sheet

Overview

AWARDS **Central Intake** functionality was designed for use by programs that have a central point of intake for all clients. Using the Central Intake functionality a client is admitted into the intake program, is screened or registered, and from there is placed in their destination placement program(s).

Required Permissions

Permissions required to access and use Central Intake functionality are as follows:

Program Chart Access *
Display Any Chart Records Buttons
Display Chart Records Intake/Admission Button
Display Chart Records Profile Button
Referrals Data Entry
Program Admission/Discharge

☀ ***Tip:*** ** Chart access to the central intake program is required; however, it is optional for the target placement program(s). If you do not have access to the placement program you can initiate the placement and a notification will be sent to users with the **Central Intake Placement Request** permit and chart access so that one of them may complete the process. If no user meets those criteria, you will receive a warning to contact the program directly.*

✎ ***Note:*** *Additional permissions, detailed in the relevant portion of this document, will be required if you will be completing the initial setup to configure a central intake program in your AWARDS database.*

About This Document

This document is intended to guide you through the process of using the Central Intake functionality to place a client into a program in AWARDS. Specific topics covered are:

Setting Up a Central Intake Program - Learn to set up an intake program and its target programs.
The Central Intake Process - Learn to process admissions and make placements using Central Intake.
Frequently Asked Questions - Learn the answers to common Central Intake questions.

Setting Up a Central Intake Program

In order to use the Central Intake functionality, you must first complete some basic program setup. During this setup you will identify your central intake program and specify its target placement programs.

✎ ***Note:*** *It is possible to set up one central intake program or several. For example, an agency that has five housing programs and five case management programs may be set up so that there is a central intake program for each program group.*

✎ ***Note:*** *In order to set up a central intake program in AWARDS you must be in the "Executive Office" or "System Administrator" user group, OR have these permissions:*

ONE of the following:
Display Executive Administration Buttons
Permissions Data Entry
Permissions Data Entry for All Staff and Layers

AND:
Agency Program Information

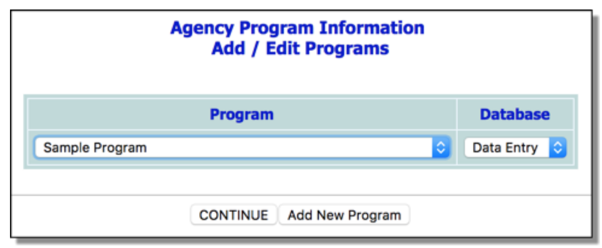
If you will be making changes to the settings of an existing central intake program (for example, adding to the target program selections) you must also have:

Program Chart Access

To set up (or make changes to) a central intake program in AWARDS, complete the following steps from the AWARDS Home screen:

1. Click **Administration** from the left-hand menu, and then click **System Setup**. The *System Setup Menu* is displayed.

2. Click **Agency Program Information**. The *Agency Programs Update Menu* page is displayed.



3. Click **Add/Edit Entire Program**. The *Add/Edit Programs* page is displayed.

4. Confirm that the **Database** option is set to its default value - "Data Entry."

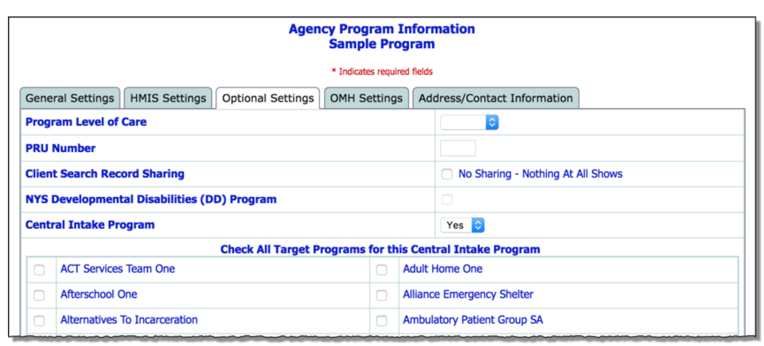
5. At this time, do one of the following based on whether you are working with a new or existing program:

- **When adding a new central intake program** - Click **Add New Program**.
- **When making an existing program a central intake program** - Click the **Program** drop-down arrow, select the program in question, and then click **CONTINUE**.
- **When adjusting the target placement list for an existing central intake program** - Click the **Program** drop-down arrow, select the program in question, and then click **CONTINUE**.

The *Agency Program Information* page is displayed. By default, the first of the program information tabs, "General Settings," is open on this page. It is used to set basic program information.

6. Click the **Optional Settings** tab.

7. Enter or make changes to the optional settings information this tab contains as necessary. In order to make this a central program, be sure to set these options as follows:



- **Central Intake Program** - Click this drop-down arrow and select "Yes." The page is automatically refreshed so that you may designate target placement programs.

- **Check All Target Programs for this Central Intake Program** - Click the check box next to each program into which placements may be made from this central intake program.

8. Click each of the other program information tabs and enter or make changes to the information they contain as necessary. Available tabs will include, but (based on how your AWARDS database is configured) may not be limited to, **General Settings** and **Address/Contact Information**.

9. Click the **Optional Settings** tab.

10. Click **CONTINUE** to save the program information. A confirmation dialog box is displayed. This dialog box shows your newly entered/updated information, along with the previous values for each field/option if applicable.

11. Review the changes carefully, and then click **CONTINUE** to proceed. A read-only report version of all information for the program is displayed. (To instead cancel the changes and return to data entry mode, click **Cancel**.)

★ ***Important!*** *Do not click your browser's back button upon completion of the data entry process; instead, move forward by clicking one of the available navigation buttons at the bottom of the page. If it is necessary to make additional changes to the program information for example, click **Return to Data Entry**.*

The process of setting up a central intake program and specifying its target placement programs is now complete.

★ ***Important!*** *Please keep in mind that if a new program has been created, some users are automatically granted program chart access to it at this time. Anyone else who needs access to the program must be manually granted program chart access permission using the System Setup module's Permissions Maintenance feature. For more information on assigning permissions, see AWARDS Online Help.*

The Central Intake Process

The central intake process is comprised of two steps:

- Step 1: Processing client admission into the central intake program
- Step 2: Making a client placement from the central intake program

Step 1: Processing client admission into the central intake program

The first step in the central intake process is to create a referral for the client in the central intake program, and then to process his/her admission into the program. The standard single-step admission or multi-step admission processes, completed within the Intake/Admission module, apply here. For detailed instructions on using either intake type, please refer to AWARDS Online Help.

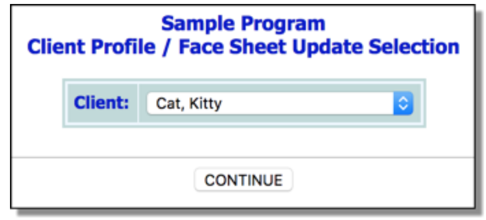
Step 2: Processing client placement from the central intake program

Once a client has been admitted to the central intake program, a case worker can then assign him/her to the appropriate placement program. The client can then be placed into that program in AWARDS from within his/her face sheet in the Profile module. To do so, complete the following steps:

1. Click **Census** from the left-hand menu, and then click **Profile**. The *Client/Program Profile* page is displayed.

2. Click the **Program/Site** drop-down arrow and select the central intake program into which the client you are working with was admitted.

3. Confirm that the **Database** option is set to its default value - “Data Entry” - and that the **Current Roster** radio button beneath the Face Sheet button is selected.



4. Click **Face Sheet**. The *Client Profile/Face Sheet Update Selection* page is displayed.

5. Click the **Client** drop-down arrow and select the client for whom the placement is to be made.

6. Click **CONTINUE**. The *Client Face Sheet* page is displayed.

7. Navigate to the bottom of the first face sheet section (containing the client’s demographic data) where you will find the placement option.

8. Click the **Select Program for Placement** drop-down arrow and select the associated target placement program to which the client has been assigned.

✎ ***Note:*** *When completing this step, please keep in mind that the placement program drop-down selection list contains all programs which are specified as “target programs” for the selected central intake program using the Add/Edit Program component of the System Setup module’s Agency Program Information feature.*

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9. Click **Make Placement**.

☀ ***Tip:*** *If a client has been placed into all associated target placement programs, no additional placements can be made. As a result, you will see a* ***Process Discharge*** *button in place of* ***Make Placement****. Click* ***Process Discharge*** *to discharge this client from the central intake program.*

☀ ***Tip:*** *If necessary, the client can be re-admitted to the central intake program after discharge using the steps outlined in this document.*

The next part of the process varies based on whether or not you have chart access permission to the selected target program:

- **If you have chart access** - A referral form is generated for the client in that program, and is now displayed. Continue with step **10**.

✎ ***Note:*** *During the referral generation process an internal audit message is automatically sent out to users with chart access to the placement program who also have the “Central Intake Placement Notification” permission, to the worker making the placement, and to that worker’s supervisor to inform them of the referral or placement.*

- **If you do NOT have chart access** - An alert notification is displayed letting you know that you cannot complete the placement on your own. To have a message sent to other staff with the necessary chart access and the **Central Intake Placement Requests** permit so that one of them may complete the process, click **OK**; this message will also be sent to the worker making the placement and that worker’s supervisor. Otherwise, click **Cancel** to return to the face sheet. (If you click **OK** but no users meet the necessary criteria, a second alert is displayed letting you know that you need to contact the program directly.) The remaining steps in this process do not apply.

10. Complete the form and then continue with the standard single-step or multi-step admission process as appropriate. For detailed instructions on using either intake type, please refer to AWARDS Online Help.

☀ ***Tip:*** *After the referral has been made, whether or not the client has yet been admitted, the placement displays in a "Program Placements" table on the face sheet for easy reference.*

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11. If necessary, repeat this process to place the client in another program.

The placement process is now complete.

★ ***Important!*** *At this time the client in question is on the roster of BOTH the central intake AND placement programs. If it is no longer necessary for the client to be in the central intake program, he/she must be manually discharged from that program using the Discharge module's Process Discharge feature (or using the Process Discharge button on the face sheet if all possible placements have been made). For more information on processing discharge, please refer to AWARDS Online Help.*

Also, when working with the records of clients who have been placed using the central intake process, please be aware that:

- Any data entered on the face sheet of the client in the central intake program moves with that client to the placement program. Intake data (other than name, social security number, and gender detail) and services data (any notes written for the client) do NOT move with him/her.

- When working with program type-specific data (for example, data collected for HUD programs or for New York State OASAS program), that data does not carry over from the central intake program to the placement program. As a result, that data must be entered a second time upon completion of a placement.

Frequently Asked Questions

Can I be notified when a client is placed into a program from central intake?

Yes, the worker making the placement and their supervisor receive an internal audit message whenever a program placement or referral is made from a central intake program, as do users with the **Central Intake Placement Notification** and chart access to the program.

Can intake cloning be used with a central intake program?

No, the intake cloning functionality was not designed for use by central intake programs. During program placement from a central intake program, a new referral record is automatically opened for the placement program. Because this takes place outside of the typical intake/admission process, data will not be populated into that form even if intake cloning is turned on. The referral form must instead be filled out manually.

Do central intake numbers impact overall agency totals?

Yes, central intake programs are not separate from other agency programs in regard to data reporting and are included in overall agency totals.

How can I see which central intake clients have referrals but were not admitted?

The Central Intake Report displays any referrals the central intake program made, the program they referred to, and the outcome. To generate this report, complete the following steps from the AWARDS *Home* screen:

1. Click **Census** from the left-hand menu, and then click **Intake/Admission**.
2. Set the **Database** mode to "Reports."
3. Click **Central Intake Report**.

In the resulting report, which covers the last six months, any client who has "no" listed in the Admitted column is referred, pending, or has been rejected, and the Status column lets you know which were rejected. The report can be exported to Microsoft Excel (using the link available at the bottom of the page), from where you can delete the rejected and admitted clients, leaving you with just the pending.

Is it possible to track how long clients are in central intake programs prior to placement?

AWARDS does not have built-in functionality to track the amount of time between admission in central intake and placement into another program. While these numbers cannot be generated automatically, admission dates can be manually assessed to gather this detail.

Will forms completed in central intake programs be copied over to the placement program?

At present form data does not copy over to the placement program; however, we expect to make this functionality available in the future.