



Intake/Admission Cloning

AWARDS INSTRUCTION SHEET

The optional Intake/Admission Cloning feature in the AWARDS Intake/Admission module allows program staff to quickly and easily complete the intake process for a client by pulling in data previously entered for him or her in another program during a previous or current program episode.

Please note that CoC users in a divisional database cannot clone a client across divisions. If a CoC user admits a client into a program using the cloning functionality and the only previous program history for the client is in a different division, AWARDS will not pre-populate the referral form with client information.

REQUIRED PERMISSIONS

Because the Intake/Admission Cloning feature is optional, it is not automatically available in AWARDS. When requested, it is turned on behind-the-scenes in AWARDS by Foothold Technology. (Contact your Foothold Client Services representative to make this functionality available for your database.)

In databases for which this functionality is turned on, you must have the following permissions in order to use it:

- **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. You must also have the “Admissions Referrals Data Entry” and “Program Admission/Discharge” permissions in order to process applicant intake/admission.

ABOUT THIS DOCUMENT

This document is intended to be a quick reference guide on the Intake/Admission Cloning process. Specific topics covered are:

- **Cloning and Completing an Intake** - Learn the steps involved in cloning the client's intake. Page **2**
- **Frequently Asked Questions** – Learn the answers to common cloning questions. Page **3**

CLONING AND COMPLETING AN INTAKE

To clone an intake, complete the following steps:

1. From navigation bar, click in the **Client Search** box (or click the **Search icon**). The *Advanced Search* window is displayed.
2. In the **First Name** and **Last Name** fields, type the first two letters of the client's first and last names, respectively.
3. Click the **Limit Search Results to** drop-down arrow and select the number of matches that should be displayed in the lookup results.
4. Click **SEARCH**. The *Client Lookup Results* page is displayed. This page contains a list of clients with records in the system for whom all or part of the identifying information entered on the previous page is a match.

Consumer / Client Lookup Results

Agency File Cabinet

Search for: First_Name=kitty Last_Name=cat
Maximum Matches to Display: 25

Clone	Personal ID	AWARDS ID	Name	SSN	MC CIN	Chart ID	TABS ID	DOB	Gender	Race	Status
	152c4-ad07-6629d	100131201	Cat, Kitty	999-99-9999				05/01/1940	Male	American Indian or Alaskan Native	Sample Program In Program since 01/01/2014 Spouse: Kitten_Cat DOB 05/05/1980 Female
		000001689	Cat, Kitty								12/16/2011 Referral to Family Housing One - Accepted

Intake / Admission Menu

Merge Duplicate Consumer / Client Records

5. If there is an existing record for the client you intend to admit, with the same exact SSN, same date of birth (DOB), and with identically spelled first and last names, you will be able to perform intake/admission cloning. To do so, click the **Clone** icon to the right of the record to be cloned.



The *Intake/Admission Search* page is opened with the client's first name, last name, SSN, and program information automatically filled in.

6. If the client is not being re-admitted to the program he/she was in previously, click the **Program** drop-down arrow and select the correct program for this intake; otherwise, leave the current selection as is.
7. Click **CONTINUE**. The *Referral Search Results* page is displayed.
8. Click **Create New Application**. A new intake form is opened and shown on the *Referral Information Form* page. Because you are cloning existing data many of the fields/options on the form will already be filled out. Others, which must be configured on a program-by-program basis (such as Income), will be blank.

Clients in a divisional database cannot be cloned across divisions. If a CoC user admits a client into a program using the cloning functionality and the only previous program history for the client is in a different division, AWARDS will not pre-populate the referral form with client information.

9. Review all cloned data in the form to verify that it is still current. Make changes to the old data where appropriate, and then configure any blank fields/options as needed.

10. At this time, complete one of the following tasks based on the intake/admission process used by the program:

- **When using single-step intake** - Click **HOUSING ADMISSION** or **PROCESS ADMISSION** to admit the client (which label is used for this button is determined by the program type – residential or non-residential, respectively).

*If the client is to be rejected rather than admitted, click **Not Accepted Into Program**. The client's intake form is then saved with a status of rejected.*

- **When using multi-step intake** - Click **CREATE REFERRAL** to save the form, and then continue the intake/admission process.

For more information about the intake form and the single- and multi-step intake/admissions processes, please see AWARDS Online Help.

The intake/admission cloning process is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding intake/admission cloning can be a useful reference when you have your own questions about the functionality.

CAN CLONING BE LIMITED TO USE BY SPECIFIC PROGRAMS?

Once turned on the cloning functionality is available to all programs in a database. However, other behind-the-scenes options that work in conjunction with cloning (for example, inclusion of SSN as a search variable in Client Lookup) must be turned on at the same time. Those additional options can be set by program type, effectively limiting the cloning functionality to programs of those types as well.

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.

CAN I USE CLONING WHEN A CLIENT IS BEING RE-ADMITTED TO A PROGRAM HE/SHE WAS PREVIOUSLY DISCHARGED FROM?

Yes, intake/admission cloning works for clients who are re-entering a program in which they were previously admitted.

DOES THE CLIENT HAVE TO BE IN ANOTHER PROGRAM CURRENTLY FOR CLONING TO WORK?

No, intake/admission cloning will work if the client was a former or current client of the admitting program.

WHAT DATA CLONES IF THE WORKER DOING DATA ENTRY DOESN'T HAVE CHART ACCESS TO THE CLIENT'S ORIGINAL PROGRAM?

In the event that the worker doing the cloning doesn't have chart access to the client's original program, he/she must be sure to enter the client's SSN on the *Intake/Admission* search page if it does not populate automatically. If the name and SSN match an existing record, partial cloning will happen regardless of chart access. Specifically, AWARDS will still connect the new record to the existing ID (assuming it is in the same division if working in a divisional database), and it will clone only basic demographic information. No program-specific or episode-specific information is cloned in such instances.

WHEN A CLIENT HAS MULTIPLE PROGRAM HISTORIES WHICH ONE IS DATA CLONED FROM?

When a client has multiple program histories AWARDS uses the most recent data.

Please note that clients in a divisional database cannot be cloned across divisions. If a CoC user admits a client into a program using the cloning functionality and the only previous program history for the client is in a different division, AWARDS will not pre-populate the referral form with client information.

WHICH FIELDS IS DATA CLONED FOR?

When cloning between two programs that are both set up to submit the HUD APR, the following fields are cloned:

▪ Address	▪ Alias
▪ Alien Registration	▪ Birthdate
▪ Birthdate Data Quality	▪ Birthplace
▪ Chronic Health Condition*	▪ Citizen
▪ City/Town of Last Permanent Address	▪ County of Last Permanent Address
▪ Current student	▪ Date Left Last Permanent Address
▪ Developmental Disability*	▪ Disabling Condition
▪ Domestic Violence Victim/Survivor*	▪ Emergency Contact
▪ Employment Status	▪ Employment Tenure
▪ Episodes of Homelessness	▪ Ethnicity
▪ First Name	▪ Gender
▪ General Health	▪ Highest level of school completed
▪ HIV/AIDS*	▪ Housing Duration
▪ Housing Status	▪ Income received from any source in past 30 days
▪ Individual/Family Type	▪ Last Name
▪ Length of Stay at Previous Residence	▪ Marital Status
▪ Mental Health*	▪ Middle Name
▪ Monthly Income Sources	▪ Non-Cash Benefits received in past 30 days
▪ Number of Children	▪ Phone
▪ Physical Disability*	▪ Post-secondary Degree
▪ Primary Language	▪ Race

▪ Received vocational training or apprenticeship	▪ Relation
▪ Residence Prior to Program Entry	▪ Services sought
▪ Social Security #	▪ SSDI
▪ SSI	▪ SSN Data Quality
▪ Substance Abuse Problem*	▪ Suffix
▪ Veteran	▪ Zip Code Data Quality
▪ Zip Code of Last Permanent Address	

Intake date, primary worker, homeless cause, number of hours worked in past week, and township of last permanent residence are NOT cloned.

* In addition, many databases are configured to NOT clone special needs questions (Chronic Health Condition, Developmental Disability, HIV/AIDS, Mental Health, Physical Disability, Substance Abuse Problem, and Domestic Violence Victim/Survivor) for privacy reasons.

Please keep in mind that programs set up to submit the HUD APR and those that are not collect different data at intake/admission. As a result, not all of the above data is cloned.

WHY DOESN'T THE DATA COPY OVER FOR THE FIELD "HIGHEST LEVEL OF SCHOOL COMPLETED?"

If you are cloning between a HUD APR program and a non-HUD APR program, the Highest Level of Education Completed data is not included in the intake/admission cloning process.