



# Member / Consumer Logins

## AWARDS INSTRUCTION SHEET

In some instances, programs may choose to give their members/consumers limited access to AWARDS. Before a member/consumer can begin to work in AWARDS, he or she must be set up in the system and assigned a login.

### ABOUT THIS DOCUMENT

This document is intended to guide you through the four steps involved in creating an AWARDS login for a member/consumer:

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- Step 2: Creating an AWARDS Login ID and Password Page 2
- Step 3: Granting Access to AWARDS Functionality Page 4
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The steps involved in creating a login for an employee vary slightly from those listed here. For more information on the process of creating an employee login, please refer to the "Employee Logins" instruction sheet.

## STEP 1: VERIFYING THAT A PROGRAM RECORD EXISTS

Logins can only be created for members/consumers who have at least one current program history record in AWARDS. As a result, the first step in the process of creating an AWARDS member/consumer login is to verify that a program record exists for him or her. To do so, complete the following steps:

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

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

2. Search for the member/consumer for whom the login is to be created by entering identifying information in one or more of the fields on this page.

*Available search fields may vary from those shown in this document.*

3. From the **Limit Search Results to** drop-down list, select the number of matches to include in the search results.



| Consumer Lookup                                 |                      |
|---|----------------------|
| SSN   | <input type="text"/> |
| First Name                                      | <input type="text"/> |
| Last Name                                       | <input type="text"/> |
| Birthdate                                       | <input type="text"/> |
| Medicaid CIN                                    | <input type="text"/> |
| AWARDS ID                                       | <input type="text"/> |
| Chart ID  | <input type="text"/> |
| Limit Search Results to 25 Matches              |                      |
| SEARCH Jump Back Opening Menu Help Menu Log Out |                      |

4. Click **Search**. The *Consumer Lookup Results* page is displayed. 

This page lists those members/consumers who have AWARDS records matching all or part of the previously entered search criteria.

| Consumer Lookup Results  |                       |             |          |          |            |              |   |
|--|-----------------------|-------------|----------|----------|------------|--------------|---|
| Search for: First_Name=al Last_Name=ga<br>Maximum Matches to Display: 25 |                       |             |          |          |            |              |   |
| AWARDS ID  | Name                  | SSN         | MC CIN   | Chart ID | DOB        | Gender Race  | Status  |
| 120750001  | 120750001 Ali B.Gator | 000-00-0306 | AG12312G |          | 10/01/1960 | Female White | Supervised CR One Resident 01/17/2002 to 02/04/2002<br>Continuing Day Treatment One In Program since 01/17/2002<br>Adult Home One Resident since 02/04/2002 |
| 256  | 000000256 Ali Gator   | 000-00-0306 |          |          | 10/01/1960 | Female       | 03/05/2002 Referral to Supervised CR One<br>Undetermined Eligibility - Accepted-Admission as of 03/05/2002  |

*The status of each member/consumer is listed next to his or her identifying information, and is a useful reference for determining which programs a member/consumer has been admitted or referred to. Un-processed referral records will always be listed separate from program history records in consumer lookup search results.*

5. Verify that the member/consumer receiving an AWARDS login has a current program record, and take note of the spelling of his or her name.

*If the member/consumer does NOT have any current AWARDS program records included in the search results, or if there is only an un-processed referral for him or her (such referrals do not qualify as program records), a login cannot be created. You may wish to search again using broader criteria (such as only the first few letters of the first and last names rather than full names) in case the spelling you have for the member/consumer varies from that on the actual AWARDS records.*

6. Click **Opening Menu**. The AWARDS *Opening Menu* page is displayed.

The process of verifying that a program record exists for the member/consumer is now complete. If, during this process, you were able to confirm that the member/consumer has a current program record, continue with "Step 2: Creating an AWARDS Login ID and Password."

## STEP 2: CREATING AN AWARDS LOGIN ID AND PASSWORD

Once you have verified that a current program record exists for the member/consumer, and the spelling of his or her name on that record has been noted, an AWARDS login must be created for him or her. A login is comprised of a login ID and password that are entered by the member/consumer to access the AWARDS database.

*Logins are created using the System Setup module, Login Maintenance, Create New Login feature. Permissions required to access and use that feature are:*

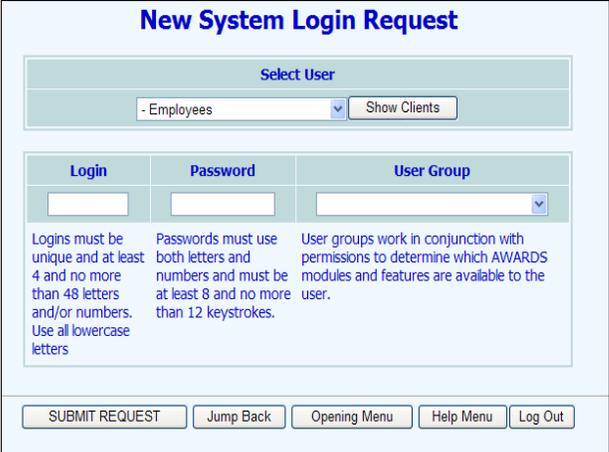
- *DATA ENTRY/ACCESS – You must have the "Display Executive Administration Buttons" permission in order to access the System Setup module in AWARDS.*
- *EXCEPTION OVERRIDES – You must have the "New System Login Data Entry" permission in order to use the System Setup, Login Maintenance, Create New Login feature.*

To create an AWARDS login ID and password, complete the following steps:

1. From the AWARDS *Opening Menu* page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Login Maintenance**. The *Login Maintenance Menu* page is displayed.

- Click **Create New Login**. The *New System Login Request* page is displayed. 
- Click **Show Clients**. The page is refreshed and member/consumer names are added to the Select User drop-down list.
- Click the **Select User** drop-down arrow and select the name of the member/consumer for whom the login is being created.

*Each member/consumer has "Member" next to his or her name in the selection list, while each staff member is labeled as an "Employee."*



*By default, the Select Users list is composed of members/consumers with a program record who do not yet have a login. For users with the "Change Login Name" permission, the list contains all members/consumers, regardless of whether those members/consumers have logins. Selecting a member/consumer who already has a login will result in the existing login information being changed, not the creation of another login. For more information on changing existing logins, see AWARDS Online Help.*

- In the **Login** field, type a login ID for the member/consumer.

*When entering the login, be sure that it is unique and that it is at least 4, but no more than 48, lowercase letters and/or numbers.*

- In the **Password** field, type a password for the member/consumer.

*When entering the password, use at least 8, but no more than 12, letters and numbers. The member/consumer can later change his or her password, as can his or her current service coordinator and others with the proper authority.*

- Click the **User Group** drop-down arrow and select the user group to which the member/consumer is being assigned, either "Consumer" or "Consumer/Staff."

*To assist medical providers with the Consumer Login feature necessary for patient access requirements, another user group option is available upon request, called "Client Portal." This user group restricts the information a consumer can access to his/her Face Sheet in read-only mode and, for agencies taking advantage of the AWARDS Meaningful Use functionality, adds a "CCDA Summary of Care" button for quick access to the electronic copy of the consumer's health record. (In comparison, clients in the Consumer user group can access: Referral Info, Face Sheet, Progress Notes, Service Plans, and Assessments.)*

*If you'd like the Client Portal user group added for your agency, please contact the Help Desk.*

- Click **SUBMIT REQUEST**. The member/consumer's login ID and password are saved and a confirmation page is displayed.
- Click **Opening Menu**. The AWARDS *Opening Menu* page is displayed.

The process of creating an AWARDS login ID and password is now complete. Continue with "Step 3: Granting Access to AWARDS Functionality."

## STEP 3: GRANTING ACCESS TO AWARDS FUNCTIONALITY

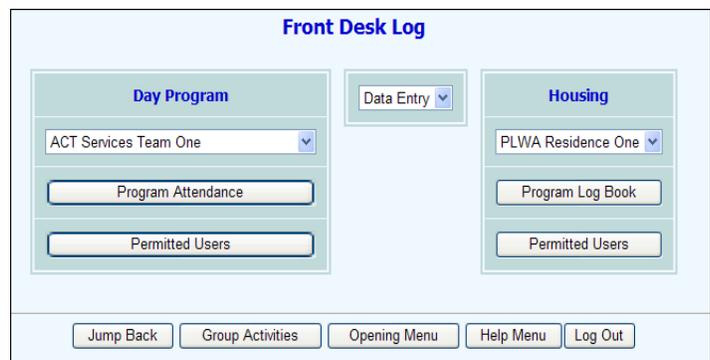
*The following step applies only when the client was placed into the "Consumer" or "Consumer/Staff" user group. It does not apply to individuals in the "Client Portal" user group, which provides much more limited access to AWARDS and does not allow for the additional configuration detailed below.*

Member/Consumer logins provide the user access to the general information modules, the password module, and a consumer records module. Under consumer records there are buttons for the face sheet, progress notes, and service plans (and within those modules users can access the Agency File Cabinet when applicable). The face sheet button only provides the user access to his or her own face sheet in report mode. Likewise, the service plans button only gives the user access to his/her service plan in report mode. The progress notes button enables the user to do data entry, but only for him or herself.

To allow a member/consumer to also enter group attendance data, use the Reception Desk module Permitted Users feature, as explained in this section. Members/Consumers added to the permitted users list see a Reception Desk module on their AWARDS Opening Menu page. Within that module, he or she will have access to the Program Attendance functionality, as well as a button with which to access the Group Activities feature.

To grant or revoke user permission for attendance data entry, complete the following steps:

1. From the AWARDS Opening Menu page, click **Reception Desk**. The *Front Desk Log* page is displayed. 
2. Click the **Database** drop-down arrow and select "Data Entry."
3. Permitted users can be assigned for both day programs and housing programs. Click the **Day Program** or **Housing** drop-down arrow as appropriate, and from the corresponding drop-down selection list select the program associated with the user for whom permission is to be granted or revoked.



4. Click **Permitted Users** from the day program or housing portion of the page, as appropriate. The *Day Program Reception Desk Log Permitted Users* page is displayed if a day program was selected. The *Site Reception Desk Log Permitted Users* page is displayed if a housing program was selected. A read-only list of those users who currently have permission by default is displayed at the top of those pages.
5. Click the **Worker** drop-down arrow and select the user for whom permission is to be granted or revoked. The current permission status of each user is listed next to his or her name (PERMITTED USER or not permitted).
6. Click either the **Add Permission** or **Remove Permission** radio button to indicate whether the selected worker is being granted the permission or having the permission revoked, respectively.
7. Click **CONTINUE**. The permission information is saved, and either the updated *Day Program Reception Desk Log Permitted Users* page (for day programs), or the updated *Program Log Book Permitted Users* page (for housing programs) is displayed.
8. Repeat steps 5 through 7 as necessary.
9. Click **Opening Menu**. The AWARDS Opening Menu page is displayed.

*AWARDS permissions cannot be assigned to members/consumers outside of those described above.*

The process of granting access to AWARDS functionality is now complete. Continue with "Step 4: Verifying and Conveying the Login."

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## STEP 4: TESTING AND CONVEYING THE LOGIN

To finish up the process of creating a new AWARDS login for a member/consumer, complete the following remaining steps:

1. Test the member/consumer's new AWARDS login ID and password by logging into AWARDS as that person. While logged into AWARDS as the member/consumer, make sure that he or she has access to the default functionality and is a permitted user in the Reception Desk module, if applicable. When finished, be sure to log out.
2. If it is discovered that the consumer does not have access to an expected feature, see AWARDS Online Help for more information.
3. Convey the new login ID and password to the member/consumer according to any existing internal procedures. Also tell the member/consumer to change his or her password upon first logging in to something he or she will remember and keep secure. For more information on updating passwords, see "Changing a Password" in AWARDS Online Help.

The process of testing and conveying the login is now complete.

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## THE PROCESS OF CREATING AN AWARDS LOGIN FOR A MEMBER / CONSUMER IS NOW COMPLETE!