



# AWARDS iKnow Session: Advanced Help Desk

Implementation Consultant (IC)

Quality Assurance (QA) Team Member

Attendees: Help Desk Members/System Administrators/Decision Makers ONLY

1. **Introductions (IC)**
2. **Tools for Local Help Desk Members (QA)**
  - a. Data Cleanup/Data Changes:
    - i. Merging Duplicate Consumers - **Request from Foothold**
      1. I realized that my client is in the database three times. How do I make her one client record? How do I do it across programs?
    - ii. Merging Duplicate Referral Agencies/Contacts – **Permissions Maintenance > Data Entry/Access > Individual**
      1. A user added a Referral Source to the list and then realized it already exists. What should I do?
    - iii. Deleting Entitlements Data - **Permissions Maintenance > Data Entry/Access > Individual**
    - iv. Deleting Medication Information - **Permissions Maintenance > Data Entry/Access > Individual**
    - v. Some Tools/Permissions should be granted to ONLY 1-2 Members of the Help Desk:
      1. Program History Corrections Tool  
(<https://demodb.footholdtechnology.com/help/?11567>) - **Request from Foothold**
        - a. Admitted Client with wrong Admission Date – can you change it to 1/1/14?
        - b. Client was discharged by mistake - how do I undo the discharge?
        - c. I admitted a client into the wrong program - how do I delete them?
        - d. What does Bed History mean? What about Agency Housing History?
      2. Surrogate Data Entry Permissions for Progress Notes, Group Notes and Contact Logs - **Permissions Maintenance > Exception Overrides > Individual**  
**NOTE: ONLY one or two people should have this Permission. This should ONLY be used in situations when there is NO way that the individual who wrote the note can update it - for example, you have a billing deadline and need to change the service type on a note written by a staff member who is on vacation or no longer works at the agency. This should NEVER be used for routine note correction. Data entered with surrogate data entry permission is also tracked in the audit trail.**
  - b. User Access:
    - i. Audit Trail - System Setup > Login Maintenance > Audit Trail ReportBuilder  
(<https://demodb.footholdtechnology.com/help/?10743>) is useful for situations below:
      1. Cannot find a note written by a writer in a progress notes report - may be that they backdated the note.
      2. Surrogate data entry permission oversight.
      3. General chart access oversight (face sheet data entry changes, old values vs. new values, etc.)
    - ii. Backdating Permissions - **Permissions Maintenance > Exception Overrides > Individual**
      1. I wrote a note last Thursday for Dan Smith but I can't find it. When I go into his record, I can't see the notes I wrote.
      2. System Setup > Business Rules > Note and Contact Editing Rules  
(<https://demodb.footholdtechnology.com/help/?10766>).

c. Administrative Functions:

i. Deleting FB forms with Data in it - [Permissions Maintenance > Exception Overrides > Individual](#)

1. I want to delete/modify a FormBuilder Form) but the red “x” doesn’t appear next to the form in the FormBuilder Form index. How can I delete a field and how do I delete a form?

ii. Creating a New Login & Password Resets - [Permissions Maintenance > Exception Overrides > Individual](#)

1. I created a new staff member in the AWARDS Human Resources module, but they don’t have a login and I can’t assign them permissions. What happened?
2. I need to change a staff member’s existing login ID. How do I do that?
3. My staff member forgot their password. How do I reset it?

iii. Electronic Signatures

1. Resetting Staff PINs - [Request from Foothold](#)
2. Removing electronic signatures – [Request from Foothold](#)

3. **Determine which programs are in which program type (QA)**

- Some preference are set by program type, rather than by individual program. Changes made to a setting at this level will affect all programs within the program type (service types, note types for example).

4. **Data Changes that Require Help Desk Intervention (QA)**

- a. Service Plan Deletion - Service Plans with data in them – [Request from Foothold](#)
- b. Reception Desk & Group Activities Attendance backdating window – [Request from Foothold](#)
  - Users will need the Reception Desk Backdating Data Entry permission – [Permissions Maintenance > Exception Overrides > Individual](#)

5. **Online Help Resources (QA)**

- a. Reiterate “How Do I” section for System Administrators and local Help Desk members
  - Organized by task, rather than feature
- b. Additional Resources
  - Instruction sheets
  - Quarterly Help Desk Calls

6. **Follow-Up (IC)**

- Set Existing Permissions: Assign the appropriate Help Desk staff the Permissions discussed (make sure to do so on the Individual Permission Layer)
- [Request Permissions from Foothold:](#)
  - Program History Corrections: Decide who will receive access. The person(s) will need to view the training video and take the quiz.
  - Send a message to Help Desk to request permissions (as described above) for the appropriate members of the Help Desk team. Make sure to list out all of the names of the people who will need access to each Permission.