Program Attendance

AWARDS INSTRUCTION SHEET

The Reception Desk module Program Attendance feature is used to enter, update, and delete program attendance for non-residential day programs in order to record who visited each program each day. It is also used to view read-only reception desk reports.

As noted here, the Program Attendance feature is limited to use by non-residential programs. For more information on Reception Desk functionality for residential programs, please see our Program Log Book *instruction sheet or AWARDS Online Help.*

REQUIRED PERMISSIONS

Permissions required to enter, update, or delete program attendance records are as follows:

- Chart Access – You must have chart access for each program for which program attendance is to be entered, update, and/or viewed – OR – you must have been granted access as a permitted user.
- Data Entry / Access – You must have the "Display Any Chart Records Buttons" and "Display Chart Records Reception Desk Button" data entry/access permissions.

Alternately, you may have been granted access as a permitted user for the program attendance feature.

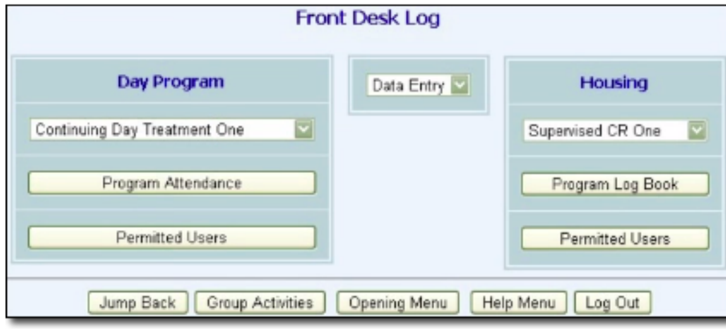
ABOUT THIS DOCUMENT

This document is intended to be a quick reference guide to using the Program Attendance feature. Specific topics covered are:

ENTERING PROGRAM ATTENDANCE

To enter program attendance, 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 mode drop-down arrow and select "Data Entry."

3. Click the **Day Program** drop-down arrow and select the day program for which program attendance is to be entered.

4. Click **Program Attendance**. The *Reception Desk Data Entry* page is displayed.

5. Click the **Reception Desk Sign-In Date** drop-down arrow and select the date for which the program attendance is to be entered.

6. If the program attendance to be entered is to include consumers whose attendance has lapsed for 90 days or more, click the **Include Inactive Roster?** check box.

7. To apply to any existing program attendance information data from activities, group notes attendance, and individual face to face progress notes clock times, lick **Apply Services Attendance Data** and then click **Jump Back** to return to the *Reception Desk Data Entry* page.

   *In order to use this feature the date range in the **Start Date** and **End Date** fields can be no more than seven days.*

   Apply Services Attendance Data is an optional feature. If it is not turned on in your database and you are interested in learning more about it, please contact your Foothold Client Services division representative.

8. Click **CONTINUE**. The *Reception Desk Data Entry* page is displayed.

9. Click the **Attendance Checklist** check box next to each consumer who visited the selected program on the selected date.

   *To select all consumers in the attendance checklist, click the **Check All** link. To clear all selected consumers, click **Clear All**.*

10. Click **ENTER CLOCK TIMES**. The *Reception Desk Data Entry* clock times page is displayed.

11. In the **In** and **Out** fields, type in and out times for each consumer to indicate when each visit began and ended (using HH:MM AM/PM format).

    *If a consumer visited more than once on a single day, continue with step **12**, then repeat the steps outlined in this section. A second set of in/out fields for his or her "return visit" is available once the reception desk record has been saved for the first time.*

12. Click **UPDATE & FINISH**. The program attendance information is saved and a read-only report version of the information is displayed on the *Reception Desk Report* page.

    *To make changes to the program attendance at this time, click **RETURN TO DATA ENTRY** to return to the Reception Desk Data Entry page.*

The process of entering program attendance is now complete.

UPDATING PROGRAM ATTENDANCE

To update previously entered program attendance, 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 mode drop-down arrow and select "Data Entry."
3. Click the **Day Program** drop-down arrow and select the day program for which program attendance is to be updated.
4. Click **Program Attendance**. The *Reception Desk Data Entry* page is displayed.
5. Click the **Reception Desk Sign-In Date** drop-down arrow and select the date for which the program attendance is to be updated.
6. If the program attendance to be updated is to include consumers whose attendance has lapsed for 90 days or more, click the **Include Inactive Roster?** check box.
7. To apply to any existing program attendance information data from activities, group notes attendance, and individual face to face progress notes clock times, lick **Apply Services Attendance Data** and then click **Jump Back** to return to the *Reception Desk Data Entry* page.

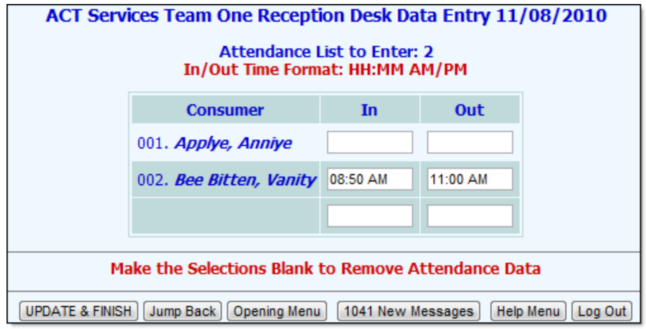
    *In order to use this feature the date range in the **Start Date** and **End Date** fields can be no more than seven days.*

    Apply Services Attendance Data is an optional feature. If it is not turned on in your database and you are interested in learning more about it, please contact your Foothold Client Services division representative.

8. Click **CONTINUE**. The *Reception Desk Data Entry* page is displayed.
9. Make changes to the attendee selections as necessary using the **Attendance Checklist** check box next to each consumer name.

    *To select all consumers in the attendance checklist, click the **Check All** link. To clear all selected consumers, click **Clear All**.*

10. Click **ENTER CLOCK TIMES**. The *Reception Desk Data Entry* clock times page is displayed.



11. Make changes or additions to the **In** and **Out** times for each consumer as necessary, and/or add a return visit time (using HH:MM AM/PM format).

12. Click **UDPATE & FINISH**. The program attendance information is saved and a read-only report version of the information is displayed on the *Reception Desk Report* page.

To make additional changes to the program attendance at this time, click ***RETURN TO DATA ENTRY*** *to return to the* Reception Desk Data Entry *page.*

The process of updating program attendance is now complete.

DELETING PROGRAM ATTENDANCE

To delete all program attendance for a specific sign-in date, or for a specific individual on that date, 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 mode drop-down arrow and select "Data Entry."

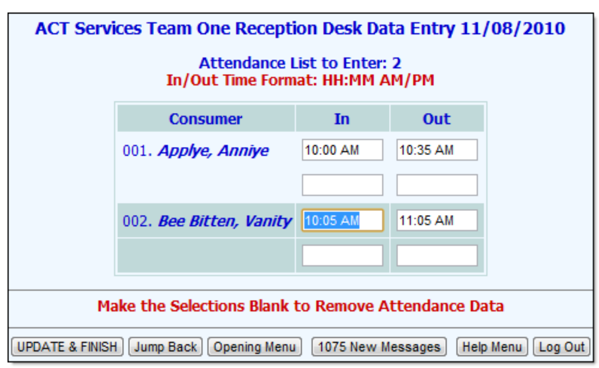
3. Click the **Day Program** drop-down arrow and select the day program for which program attendance is to be deleted.

4. Click **Program Attendance**. The *Reception Desk Data Entry* page is displayed.

5. Click the **Reception Desk Sign-In Date** drop-down arrow and select the date for which the program attendance is to be deleted.

6. Click **CONTINUE**. The *Reception Desk Data Entry* page is displayed.

7. Click **ENTER CLOCK TIMES**. The *Reception Desk Data Entry* clock times page is displayed.



8. To delete the full day's worth of program attendance data, clear all **In** and **Out** fields for each consumer listed on this page. To delete only the attendance for a specific consumer, clear only the **In** and **Out** values for that consumer.

9. Click **UPDATE & FINISH**. The program attendance information is saved and a read-only report version of the information is displayed on the *Reception Desk Report* page.

To make additional changes to the program attendance at this time, click ***RETURN TO DATA ENTRY*** *to return to the* Reception Desk Data Entry *page.*

The process of deleting program attendance is now complete.

VIEWING PROGRAM ATTENDANCE REPORTS

AWARDS provides users with a variety of program attendance reports designed to meet the most basic or detailed reporting needs:

- Viewing a Basic Attendance Report – Page **6**
  The "Basic" program attendance report contains a sortable list of attendance information including: clients, date and visit duration type, and a few other key pieces of data.
- Using the Reception Desk ReportBuilder – Page **7**
  The Reception Desk ReportBuilder is used to generate customized reports of basic client demographics and detailed program attendance information.

VIEWING A BASIC PROGRAM ATTENDANCE REPORT

To view a read-only program attendance report, 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 mode drop-down arrow and select "Reports."

3. Click the **Day Program** drop-down arrow and select the day program for which the program attendance report is to be viewed.

4. Click **Program Attendance**. The *Reception Desk Reports* page is displayed.

5. Click the **Client** drop-down arrow and select the client for whom the report is to be viewed. The default value is "All Clients."

6. Only those reception desk records for which the date falls within the range in the **Start Date** and **End Date** fields on this page will be included in the report. Make changes to the default date range as necessary (using mm/dd/yyyy format).

7. Click the **Sort By** drop-down arrow and make a selection to indicate how reception desk information is to be displayed in the report. Available selections are:

   - **Date** - When this option is selected, program attendance will be sorted by date with the most recent information listed last.

   - **Name** - When this option is selected, program attendance will be sorted alphabetically by consumer name.

8. To limit report content to only those attendance records last updated by a specific worker, click the **Worker** drop-down arrow and select that individual. The default value is "All Workers."

9. In the "Visit Type Durations" portion of the page, enter the number of hours to be used when distinguishing between visit types on the report. The default durations are: Less than 3 hours, 3 to 5 hours, and More than 5 hours. Make changes to these defaults as needed.

10. The **Show Individual Detail** option is selected by default; therefore, the report to be viewed will include dates, consumer names, in/out times, hours of each visit, total number of visits, and visit duration counts. If the report should only include dates, total number of visits, and visit duration counts, de-select this option by clicking on the check box.

11. To insert a page break after each consumer's program attendance (when sorting by "Name") or each date's program attendance (when sorting by "Date"), click the **Insert Page Break** check box.

12. Click **CONTINUE**. The program attendance report is displayed on the *Reception Desk Report* page.

    The contents of this read-only report are based on the selections made on the previous pages; however, all reports contain visit duration count summaries based on the values entered in step 9. In addition, a "Last Updated" column is included in the report, which contains the name of the worker who last updated each record and the date on which the update occurred.

The process of viewing a program attendance report is now complete.

USING THE RECEPTION DESK REPORTBUILDER

To generate and save a Reception Desk report that can be re-run in the future, to generate a single-use report, or to use an existing report format to generate a report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Reception Desk**. The *Front Desk Log* page is displayed.

2. Click the **Program** drop-down arrow under "Day Program" and select the individual program for which the report is to be run, or select a group of programs using one of the available "All" selections.

3. Click the database mode drop-down arrow and select "Reports."

4. Click **Program Attendance**. The *Reception Desk Reports* page is displayed.

5. Click **Reception Desk ReportBuilder**. The *Reception Desk ReportBuilder Settings* page is displayed.

6. Report contents are limit to program attendance records for clients who were on the roster of the selected program at some point during the date range specified using the **Roster Date Range** fields on this page. By default, both Date Range fields contain today's date to include in the report only those clients on the current roster. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers.

7. For the clients included in the report, contents are limited to reception desk sign-in dates that took place at some point during the range specified using the **Reception Desk Sign-In Dates** fields on this page. By default, the sign-in date range is set for dates within the last month. If necessary, make changes to that default date range using the available **From** and **To** fields/date pickers.

   In the event that you are creating a new report that will be saved, or if you will be using an existing report format that was saved previously, please be aware that the date ranges reference here and in step 6 are not saved with reports. You must set them each time the report is run.

8. Leave the **Provide ExportBuilder Options** check box unchecked. It is NOT relevant to report generation.

   This option provides access to an ExportBuilder corresponding to the ReportBuilder with which you are working. AWARDS ExportBuilders – which are designed for use by individuals who are familiar with export files and formats, their design, and setup – harness the power of ReportBuilder functionality and take it a step further to meet a variety of outside reporting needs. With ExportBuilders, users can create customized data reports as they would with the ReportBuilder itself, and from those reports generate export files of a number of different types – CSV, TXT, XLS, or XML. Exported files can be saved to your computer, then uploaded into other data collection systems and/or worked with in other applications as needed. Additionally, as can be done with ReportBuilders, ExportBuilder formats can be saved and shared for future use.

   The instructions provided here detail use of the Reception Desk ReportBuilder only, not the corresponding ExportBuilder. For more information on using ExportBuilders, please refer to Online Help or the ExportBuilders instruction sheet.

9. If you would like the report (both its content and an Excel file version) to be sent to your AWARDS Messages module upon its completion, click the **Send in AWARDS Message** check box. When this option is selected, you will be able to continue working in AWARDS if you so choose, rather than waiting for the report to generate. You will also be able to retain the report in your messages for reference at a later time without having to re-generate it.

10. Use the **Select a saved report format** drop-down options at the bottom of the page to specify whether you will be generating the report from scratch or using a previously saved report. Available choices are to:

    - **Use a previously saved report format –** To generate the report using a previously created and saved format, select that format from this drop-down. When using this method, you can immediately generate the report without changing any settings. Alternately, you can first review and modify the settings of the format by checking off the available **Provide option to modify settings of saved report format** check box.

    - **Start from scratch, without using a previously saved report format –** To create your own report format for single-time use or for saving and later re-use, leave the saved report format drop-down blank.

11. Click **CONTINUE**.

    If you are using an existing report format and have NOT chosen to view/modify the settings of that format, you are now taken directly to the report page. Continue with step **22**.

    If you chose to send the report to yourself via the Messages module (in step 8), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step ***22****.*

    In all other instances, the *Options* page is displayed. This page contains a list of all variables grouped by type, and will include sections for "Demographics" and "Reception Desk Information." Continue with step **12**.

12. The Reception Desk ReportBuilder includes all clients who were enrolled in the selected program(s) at some point during the date range specified in step 6. In some cases, that may result in duplicate report records if the client attended the program multiple times during the date range specified in step 7. To filter out those duplicates and list each client only once in report results, lick the **Unduplicated Client Count** check box.

    When this option is selected, the report contents are limited to the most recent reception desk record for each included client.

13. Click the check box next to each variable to be included in the report, and/or use the available **Check All** options as needed.

14. Click **CONTINUE**. The *Options – Continued* page is displayed.

15. Configure or make changes to the options in the "Filter Options" portion of the page as necessary to adjust the scope of the record contents. Set the "Show Individual Detail" and/or "Summary Table" options to adjust the way in which the contents are displayed.

    Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options, please see AWARDS Online Help or refer to the ReportBuilder Basics instruction sheet.

16. To save the settings made on this and the previous pages so that the report can easily be re-generated in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

    If it is not necessary to save the report format and you only want to generate the report itself, skip to step ***21****.*

17. When saving a new report, in the **Report Format Title** field, type the name of the format.

    We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

    When working with a previously saved format, the title defaults to the name of the selected report format. To save the modified report format as a new format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

    Please keep in mind that only the user who originally saved a format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

18. Click one of the available **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

    - **Yourself –** When selected, only the user saving the report format has the ability to use or modify that format.

    - **All Staff –** When selected, all staff in the program(s) selected in step 2 have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

    In a single-agency AWARDS database, only members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

19. Click one of the available **Allow Report Format for** radio buttons to determine which programs this report format can be used for. Available options are:

    - **This Program –** When selected, the report format being saved is available for use by only the program chosen in step 2.

    - **All Programs –** When selected, the report format being saved is available for use by all programs, regardless of which program was chosen in step 2.

    The Allow Report Format for options are only available when a single program was selected in step 2; otherwise the format is saved for all programs by default.

20. Click **Save Report Format**. The report format is saved and the *Options – Continued* page is re-displayed.

21. Click **DISPLAY REPORT**. The report is generated and displayed on the *Reception Desk ReportBuilder* page.

    If you chose to send the report to yourself via the Messages module (in step 9), a notice will first be displayed on the page to let you know that report generation is in process and that the report will be sent to your Messages module upon completion. You can then navigate away from the page, or wait for the report to complete, and then proceed with step ***22****.*

22. At this time individual detail and/or summary table content can be hidden or sorted as needed. The report can also be printed or exported to Microsoft Excel. For more information on working with ReportBuilder report contents, please see AWARDS Online Help or refer to the ReportBuilder Basics instruction sheet.

The process of generating a Reception Desk ReportBuilder report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding Program Attendance can be a useful reference when you have your own questions about the functionality.

CAN I ENTER PROGRAM ATTENDANCE FOR "PENDING" CONSUMERS?

Yes. In programs that use both Process Intake and Process Admission, a consumer will be included on the attendee selection list after his or her intake has been processed.

HOW DO I BACKDATE PROGRAM ATTENDANCE DATA ENTRY?

To backdate program attendance data entry users are required to have the “Backdated Reception Desk Log Data Entry.” This permission allows users to enter the reception desk data for the previous month. If the standard backdating window for this permission does not go back far enough, users may contact the Help Desk for an extension. Requests for an extension should include the name of the program the extension is required for, and the oldest date for which the user must complete data entry.

HOW DO I VIEW RECEPTION DESK DATA FOR A DISCHARGED CONSUMER?

To view program attendance/reception desk data for a consumer that has been discharged, use the Program Attendance feature in report mode. On the reporting settings page, select "All Client/Consumers," specify a date range that encompasses the time during which the consumer was in the program, de-select the daytime and evening visit options (when applicable), and sort by name. When you then click CONTINUE to generate the report, you'll be able to scroll down the page to locate data for the consumer in question.

WHERE DOES THE DATA COME FROM WHEN USING THE "APPLY SERVICES ATTENDANCE DATA" FEATURE IN DATA ENTRY MODE?

Services data is applied to reception desk records (for those programs set up to use that feature) from three places: group activities attendance data, face to face progress notes, and group notes.

WHY DOES THE "LAST UPDATED" COLUMN IN THE PROGRAM ATTENDANCE REPORT SOMETIMES HAVE BLANK CELLS?

The last updated information may be blank for data entered prior to February 15th, 2010, as that information was not captured by AWARDS prior to that date.