



New Program Setup

AWARDS INSTRUCTION SHEET

Before a new or existing program can be used in AWARDS it must be created and configured using the features in the AWARDS System Setup module. Completing the new program setup process enables you to determine how the program will work throughout the application – specifying whether it is residential or non-residential, what data entry rules it should use, and more.

Please use discretion when following the instruction in this guide, as not all programs are alike and configurations may vary. After completing the initial setup discussed in this document, please refer to AWARDS Online Help for assistance changing any of the program information.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of creating a new residential or non-residential program within the AWARDS system. Specific topics covered are:

- [Step 1: Creating a Program](#) – Learn how to create a new program within AWARDS. Page **1**
 - [Step 2: Adding Residence Units](#) – Learn how to add residence units to be used within a program. Page **7**
 - [Step 3: Configuring Program Administration Information](#) – Learn to assign directors to a program. Page **9**
 - [Step 4: Setting Note and Contact Editing Rules](#) – Learn how to set editing rules for a new program. Page **10**
 - [Frequently Asked Questions](#) – Learn the answers to common program setup questions. Page **12**
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STEP 1: CREATING A PROGRAM

The first step in the process of setting up a new agency program in AWARDS is to create the new program record.

Permissions required to create a program are:

- **DATA ENTRY/ACCESS** - You must have the "Display Executive Administration Buttons" permission AND either: a) be a member of the Human Resources or Executive Officer user group, or b) have the "Permissions Data Entry" permission.
- **EXCEPTION OVERRIDES** - Unless you are in the Executive Officer or System Administrator user groups, you must have the "Agency Program Information" permission.

To create a program, complete the following steps:

1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page 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. Click **Add New Program**. The Agency Program Information page is displayed. By default, the first of the four information tabs, "General Settings," is open on this page. →

5. Enter the new program's information by configuring the following fields and options on this tab:

- **Program Name** – In this field, type the name of the program being added.

A program cannot have the same name as any group listed under "Program Group."

- **Program Group** – Click this drop-down arrow and select the program group to which the new program belongs.

If the program group needed is not included in this list, please contact the Help Desk or your Foothold Client Services representative for assistance.

- **Division** – Click this drop-down arrow and select the division to which the program belongs. In a multi-agency or HMIS database, the division is the agency to which the program belongs.

This option is only displayed when working in a multi-agency database, and in single-agency databases for which divisions have been set up by Foothold.

- **Use HMIS Data Elements** – If the program will be submitting the CoC Annual Performance Report or will be using the HMIS data elements, check this check box.
- **Intake Form** – Click this drop-down arrow and select "Single Step Form" or "Multi Step Form" to indicate which version of the intake form is to be used by the program.

7. If the program is residential, enter values in the following housing information fields and options as appropriate:

- **Projected # of Units** – In this field, type the projected number of units for the program. Total units should be equal to the projected number of individuals not in a family, plus the projected number of families that can be served when the program is at capacity.
- **AIDS Housing Capacity** – In this field, type the HASA housing capacity of the program.
- **Homeless Housing Capacity** – In this field, type the NY/NY housing capacity of the program.
- **Projected # of Beds Field** – In this field, type the projected number of beds in the program. Total beds should be equal to the projected number of individuals not in families, plus the projected number of persons in families that can be served when the program is at capacity.

This option is only available in HMIS databases, or by request.

- **Acceptable Min. Capacity** – In this field, type the percentage of operating capacity below which the indication of some program challenge would be suggested.

- **Cap Days** – In this field, type the frequency at which the program's capacity should be measured in the Agency Status Report.

This field is available in divisional databases only.

8. In the **Monthly Service Units** field, type the average number of clients served per month.

9. In the **Drop-In Capacity** field, type the drop-in capacity of the program.

10. Click the **HMIS Settings** tab. This tab is divided into three sections as shown here: →

- **Required Project-Specific Data Elements** - Required for HMIS programs)

- **Housing Inventory Chart Data Elements** - Optional unless you plan to generate a Housing Inventory Chart from AWARDS

- **Optional Data Elements**

11. If this is an HMIS program, enter values in the "Required Project-Specific Data Elements" section of the tab, as applicable:

- **Continuum of Care** – From this selection list choose the Continuum in which this program exists. Press <Ctrl> while clicking items to assign the program to multiple Continuums of Care.
- **Continuum Project** – Click this drop-down arrow and select "Yes" or "No" to indicate whether or not the program is contributing data to the HMIS, or is being included simply to account for all programs in a continuum.
- **HMIS Project Type** – Click this drop-down arrow and select the HUD program/project type which best describes the program:

Agency Program Information

* Indicates required fields

General Settings | **HMIS Settings** | Optional Settings | Address/Contact Information

Required Project-Specific Data Elements

Continuum Of Care: New York City CoC, Balance of State CoC, Training Fake CoC

Continuum Project: [Dropdown]

HUD Project Type: [Dropdown]

Federal Funding Sources: [Dropdown]

Grant Start Date: [Date Picker] Grant End Date: [Date Picker] Grant ID: [Text]

Housing Inventory Chart Data Elements

Principal Site: [Dropdown]

GEO Code: 909090, 919191, 929292, 999999

Target Population: NA: Not Applicable

Optional Data Elements

Other Program Name: [Text]

County: [Text]

Zip Code: [Text]

Program Site Configuration Type: [Dropdown]

Site Type: [Dropdown]

Housing Type: [Dropdown]

Target Population A: [Dropdown]

FIPS Code: [Text] [Look Up FIPS Codes](#)

HPRP Grantee ID: [Text]

Operational Calendar: [Dropdown]

CONTINUE | Add/Edit Menu | Jump Back | Opening Menu | Help Menu | Log Out

Emergency Shelter	Transitional Housing	PH - Permanent Supportive Housing
Street Outreach	Services Only Program	Safe Haven
PH – Housing Only	PH – Housing with Services	Day Shelter
Homelessness Prevention	PH – Rapid Re-Housing	Coordinated Assessment
Other		

- **Affiliated with a residential program?** – If the HMIS Project Type is set to "Services Only Program" (SSO), two related options are made available. Click the **Affiliated with a residential project?** drop-down arrow and select "Yes" or "No." If "Yes" is selected, a list of all residential programs in your AWARDS database is displayed. Select the residential program this SSO is affiliated with, or choose "Other/Not Listed" if the affiliated residential program does not exist in AWARDS.
- **Federal Funding Sources and Grant Information** - Click the **Federal Funding Sources** drop-down arrow and select the federal funding source that applies to the program, or select "N/A." If a funder is chosen, fill in the corresponding required **Grant Start Date**, **Grant End Date** and **Grant ID** information can also be entered, though they are optional.

12. For programs generating a Housing Inventory Chart, enter values in the Housing Inventory Chart Data Elements section of the tab, as applicable:

- **Principal Site** – Click this drop-down arrow and select "Yes" or "No" to indicate whether or not the program is the main site for the program.
- **GEO Code** – From this selection list choose the GEO code in which the program is located. Press <Ctrl> while clicking items to assign the program to multiple GEO codes.

If you see a text box here instead of a selection list, please contact the Help Desk to have this option configured.

- **Target Population** – Click this drop-down arrow and select the category that best represents any sub-populations served by this program. Possible selection options include "DV: Domestic Violence victims," "HIV: Persons with HIV/AIDS," and "NA: Not Applicable."

13. To collect any information in the Optional Data Elements section, enter values in the fields/options available there as applicable:

- **Other Program Name** – In the event that the program name is listed as something else on the Housing Inventory Chart (HIC), type or make changes to that alternate name in this field.
- **County** – Click this drop-down arrow and select the county in which the program is located.

If you see a text box here instead of a selection list, please contact the Help Desk to have this option configured.

- **ZIP Code** – In this field, type or make changes to the program's zip code.
- **Program Site Configuration Type** – Click this drop-down arrow and select the site configuration that best describes the program. Possible selection options include "Single Site, Single Building," "Single Site, Multiple Buildings," and "Multiple Sites."
- **Site Type** - Click this drop-down arrow and select the site type that best describes the program. Possible selection options include "Non-residential: Services Only," "Residential: Special Needs and Non-special Needs," and "Residential: Special Needs Only."
- **Housing Type** – Click this drop-down arrow and select the housing type which best describes the program:

Mass Shelter/Barracks	Dormitory/Hotel/Motel	Shared Housing
Single Room Occupancy (SRO) Units	Single Apartments (Non SRO) Units	Single Homes/Townhouses/Duplexes
Not Applicable: Non Residential Program		

- **Target Population A** – Click this drop-down arrow and select the category that best represents the population served by this program.

SM=Single Males (18 years and older)	SF=Single Females (18 years and older)	SMF=Single Males and Females (18 years and older)
CO=Couples Only, No Children	SM+HC=Single Males and Households with Children	SF+HC=Single Females and Households with Children
HC=Households with Children	YM=Unaccompanied Young Males (under 18)	YF=Unaccompanied Young Females (under 18)
YMF=Unaccompanied Young Males and Females (under 18)	SMF+HC=Single Male and Female and Households with Children	

- **FIPS Code** – In this field, type or make changes to the Federal Information Processing Standards (FIPS) code for the program.

*If the FIPS code is not known click the **Look Up FIPS Codes** link, which will take you to the U.S. Geological Survey's website.*

- **HPRP Grantee ID** – If applicable, in this field type the HPRP grantee ID number that pertains to the program.
- **HUD Contract #** - In this field, type the HUD Contract number that pertains to the program.
- **Operational Calendar** – Click this drop-down arrow and select "Full Year" or "Seasonal" to indicate the operational calendar for the program.

14. Click the **Optional Settings** tab. The *Agency Program Information* optional settings page is displayed. →

15. Configure the fields and options on this tab, as applicable:

The content of this tab varies based on AWARDS database setup; as a result, you may not see all of the fields and options listed here.

- **Program Level of Care** - If the program will be conducting OASAS client transfers, click this drop-down arrow and select the program's OASAS level of care.

OASAS program transfers can only take place between programs of the same level of care. For more information on OASAS transfers, please see AWARDS Online Help.

- **Community Service Block Grant Funding** – If the program receives CSBG funding, check this check box.
- **Central Intake Program** – If the program is a central intake program, click on the drop-down arrow and select "Yes." The default value is "No."
- **Serves Homeless Only?** – If the program serves homeless clients only, check this check box.

- **Consumer Lookup Record Sharing** – If the program's data is sensitive (for example, in the case of a domestic violence program) and should not be shared with staff of other programs, click the **No Sharing – Nothing At All Shows** check box. When that option is checked off, users without chart access to the program do not see that program's clients when using the Consumer Lookup feature located on the *AWARDS Opening Menu* page. Additionally, in such cases if a client has a record in multiple programs, one of which the user has chart access to and one to which he/she does not, only the record for which access is granted is shown in the lookup search results.

This option is not available in databases that already have customized program-level sharing functionality in place. In those databases, you may see a Consumer Lookup Record Sharing drop-down selection here, along with a Consent Exportation Terms field.

- **PRU Number** – In this field, type the reporting unit number for OASAS.

This option is only applicable to OASAS programs.

16. Click the **Address/Contact Information** tab. The *Agency Program Information* location information page is displayed. →

The screenshot shows the 'Agency Program Information' form with the 'Address/Contact Information' tab selected. The form includes fields for Street Address, City, State, Zipcode, Phone Number, and Fax Number. A red asterisk indicates required fields. Navigation buttons at the bottom include CONTINUE, Add/Edit Menu, Jump Back, Opening Menu, Help Menu, and Log Out.

17. Type the program's street address, city, state and zip code in the **Street Address**, **City**, **State** and **Zipcode** fields, respectively.

18. In the **Phone Number** field, type the program's phone number (using (nnn) nnn-nnnn format).

19. In the **Fax Number** field, type the program's fax number (using (nnn) nnn-nnnn format).

20. Click **CONTINUE**. A read-only confirmation page of program information is displayed, showing information from all of the *Agency Program Information* tabs.

WARNING! Do not click the browser's back button at this point. From the confirmation page move forward by clicking one of the available navigation buttons in *AWARDS*. For example, if you would like to make changes to the program information at this time, click **Return to Data Entry**.

*If this is an OMH program, click **Return to Data Entry** and configure the fields and options on the OMH Settings tab. If you do not see that tab and should, please contact the Help Desk for assistance.*

The process of entering a new program into *AWARDS* is now complete. If the program created is residential, proceed with "Step 2: Adding Residence Units" on page 7. If the program created was NOT residential please, proceed to "Step 3: Configuring Program Administration Information" on page 9.

IMPORTANT! Please keep in mind that when a new program is created the following individuals are automatically granted chart access to it:

- Members of the "Executive Officer" user group (in a single-agency database) and "CoC Executive Officer" user group (in a multi-agency database)
- Members of the "Agency Executive Officer" user group (in a multi-agency database) if the new program was created within their agency
- Members of the "Local CoC Admin" user group (in a multi-agency database) if the new program was created within their jurisdiction (for example, their county or CoC within the larger multi-agency database/continuum)

- Members of the "System Administrator" user group
- The individual who created the program in AWARDS

Additionally, when a program director and/or deputy director are later assigned using the Configure Administration component of the System Setup module's Agency Program Information feature, they are given chart access. Individuals with caseloads in the program also receive chart access once those caseloads have been set up.

If any of these individuals do not require chart access to the new program, it can be removed using the System Setup module's Permission Maintenance feature.

STEP 2: ADDING RESIDENCE UNITS

After a new residential program is created, the next step is to enter residence units/bed information for that program. Entry of this information is required prior to consumer intake/admissions so that the consumers will have beds to be moved into.

Permissions required when adding residence units are:

- **PROGRAM CHART ACCESS** – You must have chart access to the program for which residence units are being entered.
- **DATA ENTRY/ACCESS** - Unless you are in the Executive Officer or System Administrator user groups, you must have the "Create Residence Units" and "Display Executive Administration" data entry/access permissions.

To add residence units to the new program, complete the following steps:

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

2. Click **Residence Units**. The *Residence Units List* page is displayed. →

3. Click the **Program** drop-down arrow and select the program for which the residence units are to be entered.

4. Click the **Status** drop-down arrow and select "Current Units."

5. Click the **Database** drop-down arrow and select "Data Entry."

6. Click **CONTINUE**. The *Current Residence Units Data Entry* page is displayed. →

7. Complete the fields and options on this page as needed.

Some fields and options in this section are optional and only display in AWARDS databases where they have been specifically configured to do so. If you do not see a field or option listed here and are interested in having it added to AWARDS, please contact the Help Desk.

- **Unit ID** – Type a numerical ID for the unit or bed being created in this field. If this field is left blank, AWARDS automatically assigns the Unit ID to the unit. IDs are assigned sequentially for the entire database.

The Unit ID is a unique identifier for a residential unit. A group of beds comprising one apartment shares a single Unit ID. An apartment with only one bed has its own Unit ID.

- **Address** - Type the street address of the residence unit or bed in this field.

Do not include commas or semi-colons in addresses; instead, use dashes where separation is needed.

- **Apt/Bed** - Type the apartment number/letter of the residence unit or bed in this field.
- **City** - Type the city in which the residence is located in this field.
- **State** - Type the state in which the residence is located in this field.
- **ZIP** - Type the zip code in which the residence is located in this field.
- **County** – If this field is set to display, type the county in which the residence is located
- **First Available Date** - Type the date on which the residence unit was first available for client occupancy (using mm/dd/yy format) in this field.

The first available date entered should be on or before the admission date of the first client to have lived in that unit.

- **Gender** – Click this drop-down arrow and select the gender of consumers for whom the residence unit is available. The default value is "Either."
- **SmokeFree** – Click this drop-down arrow and indicate whether the residence unit is smoke free. The default value is "Either."
- **Household Type** – Click this drop-down arrow and indicate whether the residence unit is for "Households without children," "Households with at least one adult and one child" or "Households with only children." This field is blank by default.

For Apt/Beds that share the same Unit ID, the household type selection must also be the same. If different household types are selected for apt/beds with the same Unit ID, an error will display when saving the page

- **Bed Type** - Click this drop-down arrow and indicate whether the bed is "Facility-Based," "Voucher" or "Other." There is also a blank option. The default selection is "Facility-Based."
- **Availability** - Click this drop-down arrow and indicate the type of availability for the unit. Options include: "Year-Round," "Seasonal" or "Overflow." There is also a blank option. The default selection is "Year-Round."
- **Target Population** - Click this drop-down arrow and indicate whether the target population is "Chronic Homeless Bed," "Veteran Bed" or "Youth." There is also an "N/A" option, which is the default.

If "Youth Bed" is selected, a corresponding **Accepted Youth** option is made available. Options in this additional drop-down include: "Youth age 0 to 18," "Youth age 0 to 24" or "Youth age 18 to 24." The default selection is "Youth age 0 to 18."

- **Participated in HMIS** - Click this drop-down arrow and indicate whether the unit is part of the HMIS. Options include: "Yes," "No" or "Unknown." The default selection is "Yes."

- **Client Location** - Click this drop-down list is comprised of the selections made for the program within the Agency Program Information feature's Continuum of Care field. Click this drop-down arrow and select the continuum in which the client is located.

If no selections are made in the Continuum of Care field, this drop-down will be empty.

8. Click **UPDATE**. The residence unit information is saved and the *Updated Current Residence Units Data Entry* page is displayed.
9. To make changes to any the residential unit's information, or to add another new residence unit, click **Return to Data Entry** to return to the *Current Residence Units Data Entry* page.

Once the first unit has been added, AWARDS will pre-populate the new unit field with that address. If all units of the program have the same address, you only need to enter the Apt/Bed, Gender and SmokeFree options for the next unit. Otherwise, overwrite the pre-populated fields with the correct information.

10. Repeat steps 7-9 as necessary until each unit/bed at the new program has been entered separately.

The process of adding a new residence unit into AWARDS is now complete. Proceed with "Step 3: Configuring Program Administration Information" on page 9.

STEP 3: CONFIGURING PROGRAM ADMINISTRATION INFORMATION

After the creation of the program, the administrative information for individual agency programs, including their director, and deputy director(s) must be entered.

Permissions required to configure program administration are:

- **PROGRAM CHART ACCESS** - You must have chart access to the program for which program administration information is being entered.
- **DATA ENTRY/ACCESS** - You must have the "Display Executive Administration Buttons" permission AND either: a) be a member of the Human Resources or Executive Officer user group, or b) have the "Permissions Data Entry" permission.
- **EXCEPTION OVERRIDES** - Unless you are in the Executive Officer or System Administrator user groups, you must have the "Agency Program Information" permission in order to enter or update program information.

To configure administrative administration information for the program, complete the following steps:

1. From the AWARDS Opening Menu page, click **System Setup**. The *System Setup Menu* page is displayed.
2. Click **Agency Program Information**. The *Agency Programs Update Menu* page is displayed.
3. Click **Configure Administration**. The *Configure Administrative Information* page is displayed.
4. Click the **Program/Site** drop-down arrow and select the program for which the administrative information is to be configured.
5. Click the **Database** drop-down arrow and select "Data Entry."
6. Click **CONTINUE**. The *Configure Administrative Information* page is displayed.

7. Click **Program Director**. The *Configure Program Director* page is displayed. →

8. The default **Current Program Director** value is "Unassigned." Click the **Change to** drop-down arrow and select the employee to be assigned as program director.

9. Click **UPDATE**. The program director information is saved and the *Configure Administrative Information* menu page is re-displayed.

10. Click **Deputy Program Director**. The *Configure Deputy Director* page is displayed.

11. Click the **Assign Deputy Program Director** drop-down arrow and select the employee to be assigned as a deputy director for the program.

12. Click **ADD Deputy**. The deputy director information is saved and the *Configure Administrative Information* menu page is re-displayed.

13. If more deputy directors need to be assigned to the program, proceed to step **14**. Otherwise, process of configuring Program Administration Information in AWARDS is now complete. Proceed to "Step 4: Setting Note and Contact Editing Rules" on page 10.

14. Click **Deputy Program Director**. The *Configure Deputy Director* page is displayed.

15. Click **Add New**. A new *Configure Program Deputy Director* page is displayed.

16. Click the **Assign Deputy Program Director** drop-down arrow and select the employee to be assigned as deputy director for the program.

17. Click **ADD**. The deputy director information is saved and the *Configure Administrative Information* menu page is re-displayed.

The process of configuring Program Administration Information in AWARDS is now complete.

Proceed to "Step 4: Setting Note and Contact Editing Rules" on page 10 to review or change the note editing rules for the program.

STEP 4: SETTING NOTE AND CONTACT EDITING RULES

If the note and contact editing rules for the new program are different than the default rules in AWARDS, they can be changed on a program basis. The following defaults are in place:

- **Standard Window – 10 days.** This is the number of days during which a progress note, contacts log, or group note can be written/backdated.
- **Backdate Permit Max – 45 days.** This is the number of days which a progress note, contacts log, or group note can be written/backdated if the user has a backdated data entry permission.
- **Editing Rule – "No Automatic Locking."** This indicates that notes are not locked automatically. This rule applies to progress notes and contact log entries that contain notes.

- **Strike Through on Locked/Signed Notes? – “No.”** This indicates strike through is not allowed on locked/signed progress notes, and only applies to progress notes.

If the default rules apply to the new program, this step can be skipped. Otherwise, be sure to set the program's unique rules by completing the steps below.

Permissions required to set note and contact editing rules are:

- *PROGRAM CHART ACCESS – You must have chart access to the program for which note and contact editing rules are being entered.*
- *EXCEPTION OVERRIDES - This permission, as well as the “Business Rules Data Entry” permission are required to set note editing rules and the set system timeout values.*

1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page is displayed.
2. Click **Business Rules**. The Business Rules Menu page is displayed.
3. Click the **Program** drop-down arrow and select the program for which the note and contact editing rules are to be set.

4. Click **Note and Contact Editing Rules**. The Note Writing Rules page for the program is displayed. →

5. In the **Standard Window** field, type the number of days during which a note can be written or edited.

For example, if the standard window is set to ten days, users can write and edit notes dated with today's date or dates in the past ten days.

This rule applies to progress notes, contacts log entries, and group notes.

6. In the **Backdate Permit Max** field, type the number of days during which a note can be written or edited if the user has a backdated data entry permission.

This rule applies to progress notes, contacts log entries, and group notes. In order to backdate progress notes, a user must have the "Backdated Progress Notes Data Entry" permission. In order to backdate contacts log entries or group notes, he or she must have the "Backdated Contacts Log/Group Notes Data Entry" permission. In order to backdate contacts log entries that contain notes he or she must have both the "Backdated Contacts Log/Group Notes Data Entry" and "Backdated Progress Notes Data Entry" permissions.

7. Click one of the **Editing Rule** radio buttons to indicate when notes should ever be closed and locked from further editing, and if so, when. Available options are:

- **No Automatic Locking** - When selected, notes are never locked automatically. They are only locked when a staff member manually selects the “Lock progress note” option during the progress notes data entry process, or when the note is electronically signed.
- **Lock Progress Note Immediately** - When selected, progress notes are locked immediately after they are written and saved, and they can no longer be edited after that time.

This rule applies to progress notes and contacts log entries that contain notes regardless of the location from which those notes are entered (the Employment module Progress Notes feature or the Services module Progress Notes or Contacts Log features).

8. Click the **Strike Through** drop-down arrow and select "Yes" or "No" to indicate whether strike through is allowed on signed off progress notes.

When this option is set to "Yes", a "Strike Through Original Note Text" option is available for amendment purposes when writing a progress note with the same writer, consumer, date, time, note type, and service type of an existing progress note.

This rule applies to progress notes only.

9. Click **APPLY RULES**. The note editing/writing rules are saved and a read-only report version of the rules is displayed on the *Note Writing Rules Applied As Shown* page, along with updated "Rule Entered By" information.

*To make additional changes to the note editing/writing rules at this time, click **Return to Data Entry** to return to the Note Writing Rules page.*

The process of setting note and contact editing rules is now complete.

FREQUENTLY ASKED QUESTIONS

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

HOW DO I SET UP A TRAINING PROGRAM?

Training programs can be set up the same as any other program; however, the program name must begin with "Test" or "Training." If "Test" or "Training" is not the first word of the program name, or if any other naming conventions are used (for example "Sample"), it will result in the program being included in any applicable "all" reports such as "all agency programs" reports.

WHAT ARE THE RULES FOR ENTERING RESIDENCE UNITS?

There are several rules to keep in mind when entering residence units:

- Addresses should not contain commas or semi-colons. Use dashes instead.
- In order for two rooms in a single apartment to be recognized as one unit for the purposes of leases data entry in the Operations module, each room should be entered separately using the Residence Units feature; however, the address and apartment information for each should be exactly the same. For example, if there are two rooms in Apartment 1, enter each room as Apt 1, not Apt 1 #1 and Apt 1 #2.
- If the first available date for a residence unit is more than 30 days ago, you must have the "Start Period Backdating" permission.

WHEN IS A DIVISION AVAILABLE FOR SELECTION WHEN CREATING A NEW PROGRAM?

In order for a division to be included in the selection list when creating a new program, there has to be at least one active program in that division that you have chart access to.

WHEN SETTING UP A NEW PROGRAM, WHAT ATTRIBUTES DOES THE PROGRAM GROUP SELECTION AFFECT?

Many behind-the-scenes settings are configured by Program Group, including service plan type selection, service type lists, progress note types, and more. A new program added to an existing Program Group will inherit these attributes; however, there are also some attributes that are set on a program level, and which will need to be configured for you by Foothold staff. When setting up a new program it is recommended that you let your SPM or the AWARDS Help Desk know which features it will require so that program level settings can be configured for you.

WHO IS GIVEN ACCESS TO NEW PROGRAMS?

When a new program is created, the following individuals are automatically granted chart access permission to it:

- Members of the "Executive Officer" user group (in a single-agency database) and "CoC Executive Officer" user group (in a multi-agency database)
- Members of the "Agency Executive Officer" user group (in a multi-agency database) if the new program was created within their agency
- Members of the "Local CoC Admin" user group (in a multi-agency database) if the new program was created within their jurisdiction (for example, their county or CoC within the larger multi-agency database/continuum)
- Members of the "System Administrator" user group
- The individual who created the program in AWARDS

Additionally, when a program director and/or deputy director are later assigned using the Configure Administration component of the System Setup module's Agency Program Information feature, they are given chart access. Individuals with caseloads in the program also receive chart access once those caseloads have been set up.

If any of these individuals do not require chart access to the new program, it can be removed using the System Setup module's Permissions Maintenance feature.