



Residence Units

AWARDS INSTRUCTION SHEET

The System Setup module Residence Units feature is used to enter, update, delete, and close out units in residential programs, as well as to view read-only residence unit reports.

Before residence units are added to a residential program, that program's housing capacity should be set using the System Setup module, Agency Program Information, Add/Edit Entire Program feature. For more information, see the ["Adding/Editing Programs"](#) procedure in Online Help.

REQUIRED PERMISSIONS

Permissions required to use the Residence Units feature are:

- **Chart Access** – Unless you are in the "Executive Officer" or "System Administrator" user groups, you must have chart access permission to a residential program in order to maintain and view that program's residence units information.
- **Data Entry / Access** – In order to access the System Setup module in which the Residence Units feature is located, you must have the "Display Executive Administration Buttons" data entry/access permission AND either: a) be a member of the "Human Resources" or "Executive Officer" user groups, or b) have one of the "Permissions Data Entry" exception override permissions.

Unless you are in the "Executive Officer" or "System Administrator" user groups, you must also have the "Create Residence Units" permission.

ABOUT THIS DOCUMENT

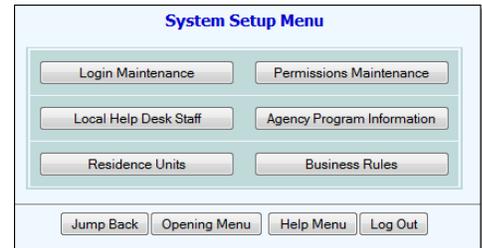
This document is intended to guide you through the process of completing common residence units data entry and report viewing tasks. Specific topics covered are:

- **Maintaining Residence Unit Information** – Learn to enter, update, delete, and close out residence units for residential programs. Page **2**
- **Understanding Residence Unit Record Options** – Learn about the fields/options available for configuration during residence unit data entry. Page **4**
- **Viewing a Residence Units Report** – Learn to view read-only report of residence unit information. Page **5**
- **Frequently Asked Questions** – Learn the answers to common residence unit questions. Page **6**

MAINTAINING RESIDENCE UNIT INFORMATION

To enter, update the information for, close out, or delete a residence unit, 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 whose residence units information you wish to work with.
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. ↴



Family Transitional Housing
Current Residence Units Data Entry

Current Units 10 (Program Configuration Setting shows 10)
Current Beds 10

[Residence Units Data Entry Tips](#)

Residence ID	*Address	*Apt/Bed	*City	*State	*Zip	County	*First Available Date	*Gender	*SmokeFree	Closure
1. 6045	678 Brook Avenue	1	Bronx	NY	11111	Bronx	01/01/90	Either	Either	Occupied
2. 6046	678 Brook Avenue	2	Bronx	NY	11111	Bronx	01/01/90	Either	Either	Occupied
3. 6047	678 Brook Avenue	3	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
4. 6048	678 Brook Avenue	4	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
5. 6049	678 Brook Avenue	5	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
6. 6050	678 Brook Avenue	6	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
7. 6051	678 Brook Avenue	7	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
8. 6052	678 Brook Avenue	8	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
9. 6053	678 Brook Avenue	9	Bronx	NY	11111	Bronx	01/01/90	Either	Either	
10. 6054	678 Brook Avenue	10	Bronx	NY	11111	Bronx	01/01/90	Either	Either	Occupied
11.	678 Brook Avenue		Bronx	NY	11111	Bronx	01/01/90	Either	Either	New Unit

UPDATE Jump Back Opening Menu Help Menu Log Out

7. At this time, complete one or more of the following data entry tasks as needed:

For a summary of residence unit data entry tips, click [here](#), or click the **Residence Units Data Entry Tips** link in *AWARDS*.

- **Add a new residence unit** – To do so, configure the blank New Unit fields at the bottom of the page as necessary. For more information on each residence unit fields and option, see the "Understanding Residence Unit Record Options" section on page 4.

During the process of adding residence units, keep in mind the following:

- *If other residence units have already been entered and the addresses for those units are all the same, AWARDS pre-populates the new unit fields with that address. When that happens, only the Apt/Bed field needs to be filled out in order to add a new unit.*
- *Addresses should not contain commas or semi-colons. Use dashes instead.*
- **Make changes to an existing residence unit** – To do so, make changes to the information for the residence unit in question. For more information on each residence unit field and option, see the “Understanding Residence Unit Record Options” section on page 4.

During the process of making changes to residence units, keep in mind the following:

- *Data entry is limited to groups of 50 residence units at once. If there are more than 50 units in the program, it may be necessary to click **Update and Open Next Group of Units** so that the group containing the unit to be updated is displayed in data entry mode.*
- *The addresses of currently or previously occupied residence units can only be updated by the Help Desk. Users with the "Create Residence Unit" permission are limited to updating the gender and smoking information for those units.*
- **Delete a residence unit that has never been occupied** – To do so, enter a closure date that is the same as the first available date.
- **Close out an existing residence unit that is no longer being used** – To do so, in the **Closure** field of the unit in question, type the last date on which the unit was occupied or available for occupancy (using mm/dd/yyyy format).

During the process of closing out residence units, keep in mind the following:

- *Data entry is limited to groups of 50 residence units at once. If there are more than 50 units in the program, it may be necessary to click **Update and Open Next Group of Units** so that the group containing the unit to be closed out is displayed in data entry mode.*
- *If a unit is currently occupied, the Closure field will have a read-only value of "Occupied." In such cases if the unit must be closed out the client residing in that unit will first need to be moved into another unit or discharged as appropriate.*

8. If all of the addresses for the existing residence units are the same, AWARDS pre-populates the new unit fields at the bottom of the page with that address. If a new unit is not being entered at this time, delete the **First Available Date** value from the new unit line.
9. Click **UPDATE**. The residence unit information is saved and the updated *Current Residence Units Data Entry* page is displayed.

*If there are more than 50 residence units in the program and not all units have yet been seen in data entry mode, click **Update and Open Next Group of Units** rather than UPDATE. At that time the next group of units is displayed, and the data entry process should be repeated beginning with step 7.*

*To make additional changes to the residence units information, or to add another new residence unit, click **DATA ENTRY** to return to the Current Residence Units Data Entry page.*

The process of maintaining residence unit information is now complete.

UNDERSTANDING RESIDENCE UNIT RECORD OPTIONS

This section of the Residence Units instruction sheet contains information on each field and option available when maintaining residence unit information.

RESIDENCE ID

In the **Residence ID** field, type or make changes to the numerical ID for the unit or bed being created. If this field is left blank when creating a new unit, AWARDS automatically assigns the Residence ID to the unit. IDs are assigned sequentially for the entire database.

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

ADDRESS

In the **Address** field, type or make changes to the street address of the residence unit or bed.

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

When multiple residence units are located in the same building, be sure to enter the address exactly the same for each.

APT/BED

In the **Apt/Bed** field, type or make changes to the apartment number/letter of the residence unit or bed.

CITY

In the **City** field, type or make changes to the city in which the residence unit is located.

STATE

In the **State** field, type or make changes to the two letter abbreviation for the state in which the residence unit is located.

ZIP

In the **Zip** field, type or make changes to the zip code of the residence unit.

COUNTY

In the **County** field, type or make changes to the county in which the residence unit is located.

This is an optional field and only displays in AWARDS databases where it has specifically been configured to do so. If you do not see this field and are interested in having it added to AWARDS, please contact the Help Desk.

FIRST AVAILABLE DATE

In the **First Available Date** field, type or make changes to the date on which the residence unit was first available for client occupancy (using mm/dd/yy format).

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

If the first available date for a residence unit is more than 30 days ago, you must have the "Start Period Backdating" permission.

GENDER

Click the **Gender** drop-down arrow and select the gender of consumers that this residence unit is available to. The default value is "Either." Other available options are "Male" and "Female."

SMOKEFREE

Click the **SmokeFree** drop-down arrow and indicate whether the residence unit is smoke free. The default value is "Either." Other available options are "Yes" and "No."

CLOSURE

A date should be entered in the **Closure** field if the corresponding residence unit will no longer be available for occupancy. It can only be filled in if the residence unit is currently unoccupied.

To archive a residence unit that was previously occupied but that is no longer available for use, enter the date of last occupancy in the Closure field. To delete a residence unit that was never occupied, enter a closure date that's the same as the first available date for that unit. For more information, see the "Maintaining Residence Unit Information" section on page 2.

VIEWING A RESIDENCE UNIT REPORT

To view a read-only residence unit report, 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. →

Program	Status	Database
Family Transitional Housing <=> Transitional Housing Families	Current Units	Data Entry

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

4. Click the **Status** drop-down arrow and select the status of those residence units to be included in the report: "Current Units," "Archived Units," or "No Units Created."

Archived units are those for which a closure date was previously entered.

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

6. Click **CONTINUE**. The report is displayed on the *Residence Units Report* page.

The read-only report contains a table listing of all residence units meeting the selection criteria specified on the previous page, and includes address, first available date, gender, and smoking information.

Click any of the table's column headings (with the exception of Apt/Bed) to sort the list by that variable. Clicking a heading more than once will reverse the sort order. To also sort by a secondary variable, press <SHIFT> and click on the second column heading.

To limit which columns are displayed in the report table, click the column display icon in the upper left-hand corner of the report and pick and choose which columns of information should be included.

The process of viewing a residence unit report is now complete.

FREQUENTLY ASKED QUESTIONS

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

CAN WE SET UP MORE RESIDENCE UNITS THAN ARE INDICATED BY THE PROGRAM'S CAPACITY UNDER ADD/EDIT ENTIRE PROGRAM?

The capacity you enter for a program using the System Setup module, Agency Program Information, [Add/Edit Entire Program](#) feature does not impact your ability to enter residence units using the System Setup module Residence Units feature. The Residence Units feature will display the capacity on the data entry, along with the current number of units and beds. It will not, however, prevent you from adding/removing residence units. Keep in mind that the capacity is important for reporting purposes, for example when determining vacancy percentages, so it is best to have it match the number of units you have.

DOES THE RESIDENCE UNITS FIELD ON THE SYSTEM SETUP > AGENCY PROGRAM INFO > ADD/EDIT ENTIRE PROGRAM FEATURE GET UPDATED AUTOMATICALLY?

No, this information must be manually updated. To ensure correct occupancy numbers for programs that place families in apartments with varying numbers of beds in each, the **Residence Units** field should contain the number of unique Residence IDs entered in the System Setup > Residence Units feature.

This does not take into account any overflow units that may be in use by a program; those should not be included in a program's occupancy under System Setup.

HOW DO I CHANGE THE ADDRESS OF AN OCCUPIED RESIDENCE UNIT?

In the event that an address change is required for a residence unit that is currently occupied, or has been occupied in the past, the Help Desk must make that change. Be sure to provide them with the details of the existing residence unit and what specific changes must be made.

HOW DO I DELETE A RESIDENCE UNIT THAT HAS NEVER BEEN OCCUPIED?

To delete a residence unit that has never been occupied, follow the procedures in the “Maintaining Residence Units Information” section on page 2, and enter a closure date that is the same as the first available date and update.

HOW DO I REMOVE A RESIDENCE UNIT THAT IS NO LONGER IN USE?

Residence units can only be removed if they are unoccupied. To remove an unoccupied residence unit (that has been occupied in the past), follow the procedures in the “Maintaining Residence Units Information” section on page 2, and enter a closure date for it.

HOW DO I UPDATE AGENCY HOUSING RECORDS TO SHOW AN OCCUPIED UNIT HAS BEEN RELOCATED?

When an occupied unit is relocated, housing records will need to be updated to reflect the change. In order to maintain a historical record of the actual addresses the client occupied, you will need to create the new unit, swap the occupant of the old unit to the new unit, and then enter closure dates for the unit that is no longer occupied.

HOW SHOULD WE ASSIGN RESIDENCE IDs WHEN THE UNIT IS SHARED BY ROOMMATES WHO ARE NOT PART OF THE SAME FAMILY? SHOULD WE COUNT THEM AS HOUSEHOLD MEMBERS?

Each program must decide how they would like to reflect households; but typically, households are considered related family members. If you have non-related roommates each using one bed in the same residence unit, you can opt to have those two beds share the same Residence ID, without having to link the clients together in a household. If your program is set up to calculate occupancy based on bed counts (not apartment/unit counts) or is a HUD program, the two beds in this case should have unique Residence IDs.

IF MULTIPLE SINGLES ARE OCCUPYING A SINGLE HOUSE/APARTMENT/UNIT, DO ALL OF THE BEDS IN THAT UNIT STILL NEED TO SHARE A RESIDENCE ID?

No, if your program is set up to calculate occupancy based on bed counts, each bed should have its own unique Residence ID. This applies to a program that houses singles, even if they happen to have a roommate or housemate.

ONE LARGE FAMILY IS CURRENTLY TAKING UP MORE THAN ONE APARTMENT/UNIT. SHOULD THE BEDS IN THOSE APARTMENTS/UNITS SHARE A RESIDENCE ID?

There is no restriction in AWARDS that requires household members to be placed in beds of the same Residence ID, and in this case Foothold recommends leaving the units configured as they exist (with unique Residence IDs) and not as they are occupied. If you have questions about a specific housing scenario and how Residence IDs should be assigned, please contact your SPM or the Help Desk.

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.
- If the first available date for a residence unit is more than 30 days ago, you must have the "Startup Period Backdating" permission.

WHAT DO I DO IF THE RESIDENCE UNIT I WANT TO CHANGE OR CLOSE OUT IS READ-ONLY IN DATA-ENTRY MODE?

In programs with more than 50 residence units, data entry is done in groups of 50 units. If the residence unit you need to update is displayed on the page but is read-only, click the Update and Show Next 50 button to display the next group of units in data entry mode.

WHAT DOES THE ERROR "BACKDATED FIRST AVAILABLE DATE REQUIRES 'STARTUP' PERMIT" ERROR MEAN WHEN ENTERING A RESIDENCE UNIT?

This error is an indication that the first available date for the residence unit you are entering is more than 30 days in the past. In order to enter such residence units, you must have the "Startup Period Backdating" permission.

WHAT IS THE DIFFERENCE BETWEEN RESIDENCE ID NUMBERS AND HOUSEHOLD ID NUMBERS, AND HOW ARE EACH ASSIGNED?

Household IDs are assigned sequentially for the entire database at the time the household is created. Many households were created by batch conversions in early 2012 as we switched to the new Family Functionality model. Additionally, a household is created by admitting a new client and creating a new household for him. Household IDs are the ID numbers used to identify the household group on reports.

Residence IDs can also be assigned sequentially for the entire database at the time a new bed is created in System Setup > Residence Units (or using the "Auto-generate" option on the conversion worksheet available in early 2012). When creating a new unit/bed in the Residence Units feature, the Residence ID field will be blank and available for data entry allowing the user to manually enter an ID if needed. If the new unit is saved without a manually entered ID, AWARDS assigns a unique ID to the unit. Users with access to the System Setup > Residence Units feature can also manually edit Residence IDs in data entry mode. Each group of beds representing one unit should typically share a Residence ID if only one family/household is occupying it. Residence IDs are not tied to client records, and AWARDS will not crosscheck to ensure household members are placed in a matching set of beds. If you have questions about a specific housing scenario and how Residence IDs should be assigned, please contact your SPM or the Help Desk.