Room Reservations

AWARDS INSTRUCTION SHEET

The AWARDS Room Reservations functionality enables those residential programs configured to use it to reserve rooms for potential clients before they are fully admitted. Those reservations can also be updated or canceled using this functionality, and the status of unreserved rooms can be viewed and adjusted as well.

The option to reserve rooms for potential clients is set on an individual program basis using a preference behind-the-scenes in AWARDS. (For more information about having this preference set for your program, please contact your Foothold Senior Project Manager.) Staff in programs for which the preference has been set must also have the following permissions in order to use the referral, admission, and discharge-related pieces of the Room Reservations functionality:

- *GENERAL CHART ACCESS - Users must have chart access to the program associated with the applicant for whom intake/admission or discharge is to be processed. Users must also have chart access to the program associated with the room whose status is to be changed.*

- *DATA ENTRY / ACCESS - Users must have the "Display Chart Records Intake Button" and the "Display Any Chart Records Button" permissions to see the Intake module in the Chart Records portion of their opening menu page. Users must also have the "Referrals Data Entry" and "Program Admission/Discharge" permissions in order to process applicant intake/admission.   In order to process a client discharge, users must have the "Display Any Chart Records Button," "Display Chart Records Discharge Button," and the "Program Admission/Discharge" permissions.*
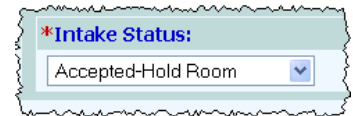
ABOUT THIS DOCUMENT

This instruction sheet will guide you through the process of admitting and discharging a client in a program that utilizes room reservations, as well as through the process of changing the status of a room.

CREATING A REFERRAL RECORD

Prior to reserving a room for a potential client, a referral record must be created for him/her. To do so, follow the procedure outlined in the in the "Multi-Step Intake/Admissions" instruction sheet, located in Online Help.

During the referral record creation process, keep in mind that on the *Referral Information Form* page, you must click the **Intake Status** drop-down arrow and select "Accepted-Hold Room." ————————————————————————————►

The Intake Status must be set to this option in order to process a room reservation.

You can make additional changes or additions to the referral record by configuring the fields and options in the "Application Evaluation" or "Demographic Data" sections.

To continue with the room reservation process, continue with "Processing a Reservation" on page 2. If the client is ready to be admitted to the program without a reservation, continue with "Processing Admission or Closing Out a Reservation" on page 3.

PROCESSING A RESERVATION

To process a room reservation to hold a room, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Records Search* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the room reservation is needed.

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

4. Rooms are reserved from within the client's referral record. In order to access referral records, a search must be performed from this page. Limit the results of this search in <u>one</u> of the following ways:

   ▪ **By Name (or other identifying information)** – To limit referral record selection by client name, type his or her name, initials, and/or alias into the **First Name**, **Last Name**, and/or **Alias** fields, respectively.

   ▪ **By Screening Date** – To limit referral record selection by date range, make adjustments to the default values in the "from" and "to" **Date Range** fields. Only those referrals with screening dates in the range entered here are included in the search results.

5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.

6. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

7. From the "Applicant" column, click the name of the client for whom the room is to be reserved. The *Referral Information Form* page is displayed.

8. Review the client's referral record, and verify that the **Intake Status** is set to "Accepted- Hold Room."

   At this point, if "Accepted – Hold Room" does not appear as an Intake Status option, this feature can still be used by completing the following steps:

   ▪ *Set the **Intake Status** to an Interview option, such as "1st Intake Interview."*

   ▪ *Enter interview information on the* Referral Information Form *page, including **Date**, **Time** and **Interviewers**. Then, proceed with step **9** of this section.*

9. Click **Process Reservation**, located approximately halfway down the *Referral Information Form* page. The *Process Reservation* page is displayed. ➞

10. Click the **Residence Reservation** drop-down arrow and select the residence unit to be reserved for the client.

11. Review the information displaying on the rest of the page, which is pulled from the referral record, and make any changes or additions as needed. Required fields and options are marked with a red asterisk (*****).

12. Click **UPDATE**. The client's reservation is processed, and the *Consumer Face Sheet* page is displayed.

The reservation process is now complete. Once a reservation has been processed, the client is listed as "*pending" in client drop-down selection lists throughout AWARDS.

PROCESSING ADMISSION OR CLOSING OUT A RESERVATION

Once a room reservation has been made for the client, they are typically either admitted or, if the client/family does not arrive, the room is closed-out.

PROCESSING ADMISSION

To process an admission for a client for whom a room has been reserved, the standard multi-step admission procedure applies. For more information on that procedure, see the "Multi-Step Intake/Admission" instruction sheet or AWARDS Online Help.

CLOSING OUT A RESERVATION

To close out a room reservation if a client/family never arrives, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Records Search* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the room reservation is to be closed.

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

4. Room reservations are closed out from within the client's referral record. In order to access referral records, a search must be performed from this page. Limit the results of this search in <u>one</u> of the following ways:

   ▪ **By Name (or other identifying information)** – To limit referral record selection by client name, type his or her name, initials, and/or alias into the **First Name**, **Last Name**, and/or **Alias** fields, respectively.

- **By Screening Date** – To limit referral record selection by date range, make adjustments to the default values in the "from" and "to" **Date Range** fields. Only those referrals with screening dates in the range entered here are included in the search results.

5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.

6. Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

7. From the "Applicant" column, click the name of the client for whom the room is to be closed. The *Referral Information Form* page is displayed.

8. Click **Re-Process Reservation**, located approximately halfway down the *Referral Information Form* page. The *Re-Process Reservation* page is displayed.

9. Click the **Reservation Options** drop-down arrow, and select "Closeout Reservation."

10. Click the **Closeout Date** drop-down arrow, and select the date on which the reservation ended.

11. Click **UPDATE**. The room reservation is closed, and the *Referral Information Form* page is displayed.

    The previously reserved room is now available for selection when working with the records of other clients.

The reservation close-out process is now complete.

UPDATING A RESERVATION

Possible updates that can be made using the room reservations feature include: deleting a reservation, switching reserved residential units, or creating a new reservation for a client who has had a previous reservation deleted.

To update a room reservation, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Records Search* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the room reservation is to be updated.

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

4. Rooms are reserved from within the client's referral record. In order to access referral records, a search must be performed from this page. Limit the results of this search in <u>one</u> of the following ways:

   - **By Name (or other identifying information)** – To limit referral record selection by client name, type his or her name, initials, and/or alias into the **First Name**, **Last Name**, and/or **Alias** fields, respectively.

   - **By Screening Date** – To limit referral record selection by date range, make adjustments to the default values in the "from" and "to" **Date Range** fields. Only those referrals with screening dates in the range entered here are included in the search results.

5. Click the **Limit Search Results** drop-down arrow and select the number of referral records to be displayed in the search results.

6.   Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.

7.   From the "Applicant" column, click the name of the client for whom the room is to be updated. The *Referral Information Form* page is displayed.

8.   Click **Re-Process Reservation**, located approximately halfway down the *Referral Information Form* page. The *Re-Process Reservation* page is displayed. ⟶

9.   At this point, decide on the following options:

  ▪ **Delete the reservation –** If the reservation is to be deleted, continue with step **10**.

  ▪ **Switch reserved rooms –** If a new residence unit is to be assigned to the client, continue with step **11**.

  ▪ **Create a new reservation –** If the client has already had a room reserved which had been canceled through either the delete or close-out method, and a new room reservation is to be created, continue to step **13**.

      This option is only available if the client has already had a room reserved, which was then canceled through the delete reservation or close-out procedures. If the <u>initial</u> room reservation is to be assigned to the client, follow the procedure outlined in the "Processing a Reservation" section of this document beginning on page 2.

10. To delete a reservation as of today's date, click the **Reservation Options** drop-down arrow, and select "Delete Reservation." Continue with step **15**.

     The "Delete Reservation" option does not provide the option for a Close Out date, as the Close Out procedure does. If the reservation should be canceled as of a date different than today's date, follow the procedure outlined in the "Closing Out a Reservation" section in this document beginning on page 3.

11. To switch the residence unit that is reserved for the client, click the **Residence Reservation** drop-down arrow and select the new residence unit.

12. Click the **Reservation Options** drop-down arrow, and select "Create Reservation." Continue with step **15**.

13. To create a new room reservation, click the **Residence Reservation** drop-down arrow and select the new residence unit to be reserved for the client.

14. Click the **Reservation Options** drop-down arrow, and select "Switch Reservation." Continue with step **15**.

15. Click **UPDATE**. The room reservation is updated, and the *Referral Information Form* page is displayed.

The process of updating a room reservation is now complete.

PROCESSING A CLIENT DISCHARGE

To process client discharge for a client in a program that utilizes the room reservations functionality, the standard discharge procedure applies with an additional step at the end.

Begin by discharging the client using the procedure outlined in the "Discharge Processing" instruction sheet and in AWARDS Online Help. After the discharge is completed, the reserved room that was being occupied is automatically listed as "Under Maintenance" in AWARDS.

A behind-the-scenes option is available that, when turned on, results in rooms being made "Vacant" after discharge rather than "Under Maintenance." If this is something you're interested in learning more about, please contact your Foothold Client Services representative or the Help Desk.

Once the room is ready for another resident, its status must be changed to "Vacant" in order for it to be available for selection when working with the record of another client. For detailed steps on completing this process, continue to "Changing the Status of a Room" on page 6.

CHANGING THE STATUS OF A ROOM

To update the status of a room, complete the following steps:

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

2. Click **Property Maintenance**. The *Maintenance Work Orders Preliminary Selection Settings* page is displayed.

3. Click **Apartment Status**. The *Apartment Status Settings* page is displayed.

4. Click the **Program** drop-down arrow and select the program associated with the apartment for which the status is to be updated.

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

6. Click **CONTINUE**. The *Apartment Status* page is displayed. ───────────▶

7. Click the **Status** drop-down arrow next to the apartment for which the change is to be made, and select the new status. For example, you can change the status of an apartment to "Vacant" if the apartment is no longer "Under Maintenance," the automatic default setting after a consumer is discharged. Repeat this step until all status changes for apartments in this program have been made as necessary.

    The other possible selection in the Status drop-down list is "Off Line," which prevents new clients from being placed into the unit during the intake/admission process.

8. In the **New Status Date** field, enter the date on which the new status took effect next to each apartment for which the status was changed.

9. Click **CONTINUE**. Any apartment status changes are saved and displayed on the *Apartment Status* confirmation page.

    Any rooms whose status you changed to "Vacant" during this process are now available for selection for new room reservations and admissions.

The process of updating the status of a room is now complete.

FREQUENTLY ASKED QUESTIONS

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

HOW DO I SWAP A CLIENT INTO AN "UNDER MAINTENANCE" RESIDENCE UNIT?

When a program utilizes room reservations functionality in AWARDS, the Housing module's swap feature will not include in the location drop-down lists any residence units that have a status of "hold room," "under maintenance," or "off line." You must first change the residence unit's status to "vacant" using the Operations module, Property Maintenance, Apartment Status feature.