



# Intake/Admission Cloning

## AWARDS INSTRUCTION SHEET

The optional Intake/Admission Cloning feature in the AWARDS Intake/Admission module allows program staff to quickly and easily complete the intake process for a client by pulling in data previously entered for him or her in another program during a previous or current program episode.

*Because the Intake/Admission Cloning feature is optional, it is not automatically available in all databases (with the exception of HMIS databases, in which it is on by default). When requested, it is turned on behind-the-scenes in AWARDS by Foothold Technology. (Contact your Foothold Client Services representative to make this functionality available for your database.) In databases for which this functionality is turned on, you must have the following permissions in order to use it:*

- **CHART ACCESS** – You must have chart access to the program associated with the applicant for whom intake/admission is to be processed.
- **DATA ENTRY / ACCESS** – You must have the “Display Any Chart Records Buttons” and the “Display Chart Records Intake Button” permissions in order to access the Intake/Admission module. You must also have the “Referrals Data Entry” and Program Admission/Discharge” permissions in order to process applicant intake/admission.

### ABOUT THIS DOCUMENT

This document is intended to be a quick reference guide on the two-step Intake/Admission Cloning process. Specific topics covered are:

- **Step 1: Verify an Intake from another Program** - Verify client data for cloning. Page **1**
- **Step 2: Cloning and Completing an Intake** - Learn the steps involved in cloning the client's intake. Page **2**
- **Frequently Asked Questions** – Learn the answers to common cloning questions. Page **3**

## STEP 1: VERIFYING AN INTAKE FROM ANOTHER PROGRAM

To clone an intake, first verify and take note of the exact spelling of the client's first and last names and his/her social security number (SSN) from the existing program record. To do so, complete the following steps:

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

*Each agency refers to its members/consumers in a different way, and the terminology in AWARDS can be adjusted accordingly. As a result, the Client Lookup button may be labeled Consumer Lookup, Member Lookup, Resident Lookup, or something similar. Regardless of how it is labeled, the functionality behind the button is the same as that described in this document.*

Client Lookup	
SSN	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Birthdate	<input type="text"/>
Medicaid CIN	<input type="text"/>
AWARDS ID	<input type="text"/>
Chart ID	<input type="text"/>
Limit Search Results to 25 <input type="button" value="Matches"/>	
<input type="button" value="SEARCH"/> <input type="button" value="Jump Back"/> <input type="button" value="Opening Menu"/> <input type="button" value="Help Menu"/> <input type="button" value="Log Out"/>	

- In the **First Name** and **Last Name** fields, type the first two letters of the client's first and last names, respectively.
- Click the **Limit Search Results to** drop-down arrow and select the number of matches that should be displayed in the lookup results.
- Click **SEARCH**. The *Client Lookup Results* page is displayed. This page contains a list of clients with records in the system for whom all or part of the identifying information entered on the previous page is a match. →
- If there is an existing record for the client you intend to admit, with the same exact SSN, same date of birth (DOB), and with identically spelled first and last names, you will be able to perform Intake/Admission Cloning.
- Take note of how the name and SSN are entered for the client as these pieces will be needed later in the cloning process. The DOB will not be used to clone, but was part of confirming the client is the same person.

**Client Lookup Results**  
Search for: First\_Name=Ted Last\_Name=beaa  
Maximum Matches to Display: 25

AWARDS ID	Name	SSN	Member ID	DOB	Gender	Race	Status
100089464	100089464 Teddy Bear	123-99-9999		02/15/1956	Male	African American	Training Scattersite II In Program since 06/21/2007

Intake / Admission Menu  
Jump Back Opening Menu Help Menu Log Out

The client data verification process is now complete; you may proceed with "Step 2: Cloning and Completing an Intake/Admission."

## STEP 2: CLONING AND COMPLETING AN INTAKE/ADMISSION

The second step in the cloning process is to clone an intake form using the client identifiers gathered from the client lookup search results. You will then be able to complete the intake/admission process as needed. To do so, complete the following steps:

- From the *AWARDS Opening Menu* page, click **Intake/Admission**. The *Intake Search* page is displayed. →
- Click the **Program** drop-down arrow and select the program associated with the client for whom the intake form is to be created.
- Enter the client's **First Name**, **Last Name**, and **SSN** in the corresponding fields. Review and ensure that all information entered is accurate. For the cloning to work, the data in these three fields must be entered exactly as noted from the client lookup search results.
- Click **SEARCH/CREATE**. The *Referral Search Results* page is displayed.
- Click **Create New Application**. A new intake form is opened and displayed on the *Intake Form* page. →

**Intake Records Search**

Program: Training Case Management Database: Data Entry

1. Search for existing referrals using identifying information:

First Name	Last Name	Alias	SSN
Teddy	Bear		123999999

OR enter a screening date range:

Date Range: 06/19/2009 to 12/16/2009

2. Limit the search by selecting the number of referral matches to be displayed on the results page:

Limit Search Results to 25 Matches

SEARCH / CREATE

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Because you are cloning existing data many of the fields/options on the form will already be filled out. Others, which must be configured on a program-by-program basis (such as Income) will be blank.

**Training Case Management**  
Intake Form: Teddy Bear

\*Intake Date: 12/16/2009 Primary Worker: [dropdown]

Referred By: To be determined after referral is created

\* Indicates Required Field

*First Name: Teddy	Middle Name:	*Last Name: Bear	Alias:
*Birthdate: 02/15/1956	*Social Security #: 123-99-9999	*Gender: Male	*Ethnicity: Not Latin

6. Review all cloned data in the form to verify that it is still current. Make changes to the old data where appropriate, and then configure any blank fields/options as needed.
7. At this time, complete one of the following tasks based on the intake/admission process used by the program:

- **When using single-step intake** - Click **HOUSING ADMISSION** or **PROCESS ADMISSION** to admit the client (which label is used for this button is determined by the program type – residential or non-residential, respectively).

*If the client is to be rejected rather than admitted, click **Not Accepted Into Program**. The client's intake form is then saved with a status of rejected.*

- **When using multi-step intake** - Click **CREATE REFERRAL** to save the form, and then continue the intake/admission process.

*For more information about the intake form and the single- and multi-step intake/admissions processes, please see [AWARDS Online Help](#) or the instruction sheets found in our [Online Training system](#).*

The intake/admission cloning process is now complete.

## FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding intake/admission cloning can be a useful reference when you have your own questions about the functionality.

### CAN I USE CLONING WHEN A CLIENT IS BEING RE-ADMITTED TO A PROGRAM HE/SHE WAS PREVIOUSLY DISCHARGED FROM?

Yes, intake/admission cloning works for clients who are re-entering a program in which they were previously admitted.

### DOES THE CLIENT HAVE TO BE IN ANOTHER PROGRAM CURRENTLY FOR CLONING TO WORK?

No, intake/admission cloning will work if the client was a former or current client of the admitting program.

### WHEN A CLIENT HAS MULTIPLE PROGRAM HISTORIES WHICH ONE IS DATA CLONED FROM?

When a client has multiple program histories AWARDS uses data from the client's first program history during the intake/admission cloning process, not the most recent history. As a result it is recommended you check the cloned data carefully to determine whether updates are needed.

### WHICH FIELDS IS DATA CLONED FOR?

When cloning between two programs that are both set up to submit the HUD APR, the following fields are cloned:

▪ Address	▪ Alias
▪ Alien Registration	▪ Birthdate

▪ Birthdate Data Quality	▪ Birthplace
▪ Chronic Health Condition	▪ Citizen
▪ City/Town of Last Permanent Address	▪ County of Last Permanent Address
▪ Current student	▪ Date Left Last Permanent Address
▪ Developmental Disability	▪ Disabling Condition
▪ Domestic Violence Victim/Survivor	▪ Emergency Contact
▪ Employment Status	▪ Employment Tenure
▪ Episodes of Homelessness	▪ Ethnicity
▪ First Name	▪ Gender
▪ General Health	▪ Highest level of school completed
▪ HIV/AIDS	▪ Housing Duration
▪ Housing Status	▪ Income received from any source in past 30 days
▪ Individual/Family Type	▪ Last Name
▪ Length of Stay at Previous Residence	▪ Marital Status
▪ Mental Health	▪ Middle Name
▪ Monthly Income Sources	▪ Non-Cash Benefits received in past 30 days
▪ Number of Children	▪ Phone
▪ Physical Disability	▪ Post-secondary Degree
▪ Primary Language	▪ Race
▪ Received vocational training or apprenticeship	▪ Relation
▪ Residence Prior to Program Entry	▪ Services sought
▪ Social Security #	▪ SSDI
▪ SSI	▪ SSN Data Quality
▪ Substance Abuse Problem	▪ Suffix
▪ Veteran	▪ Zip Code Data Quality
▪ Zip Code of Last Permanent Address	▪

Intake date, primary worker, homeless cause, number of hours worked in past week, and township of last permanent residence are NOT cloned.

*Please keep in mind that programs set up to submit the HUD APR and those that are not collect different data at intake/admission. As a result, not all of the above data is cloned.*

## WHY DOESN'T THE DATA COPY OVER FOR THE FIELD "HIGHEST LEVEL OF SCHOOL COMPLETED?"

If you are cloning between a HUD APR program and a non-HUD APR program, the Highest Level of Education Completed data is not included in the intake/admission cloning process.

## WHY IS SOME OF THE CLONED CLIENT DATA INCORRECT OR OLD?

When a client has multiple program histories AWARDs uses data from the client's first program history during the intake/admission cloning process, not the most recent history. When this is the case, there is the potential for conflicting data entered about the client. Even when a client has one program history, his/her data can change over time or may have been entered incorrectly. Therefore, when cloning an intake it is important to review all information and update data where appropriate.