

AES

Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

AGENCY ADMINISTRATOR ORGANIZATION SECTION GUIDE



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Overview of Organization Section

The initial setup of the Organization is done in Security Manager and the Program Development Web Tool, but it will need to be finished on the pages in the Organization section.

The pages are arranged in a logical sequence and should be set up in that order. Required items are shaded a light blue. Investor Targets, Target Areas, REF Conditions, Poverty Level pages in the System section should all be completed before setting up an Organization.

Local Administrators will see information for their own organizations on these pages. System Administrators can see information for all organizations. First, the SA must select the VIEW menu, and click on Security to remove the checkmark. Then when searching on the Agency Listing page, all Organizations will be available.

Glossary

Application is the designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS, Head Start, CSBG, or Weatherization; only one Application can be used at a time

Organization is an Agency set up to use the system

Program is a program within the Organization (Transitional Housing, Emergency Assistance); it will include one or more Program Components, Target Goals and Activities

Contract is the type, source and funding area from which funds are being distributed to finance a Program; these values are not subject to change from year to year

Contract Detail is the yearly renewable details of a Contract containing, among other things, the dollar amount and starting and ending dates of each annual term; these values are subject to change year to year

Funding Code is container to which one or more contracts are linked; these codes link a Contract to Staff Activities, which ultimately link to Client applications; they are not used in reporting

Program Component is a sub level of a Program designated to a narrowly focused process, which will result in Clients achieving one or more Investor Targets; it includes unique Activities and Milestones

Activity is a Staff performed service to assist Clients in completing Milestones (case management, assessment, home visit); these will be recorded in the system

Standard Names organize Staff Activities into Standard Categories for reporting purposes

Milestones are Interim Client results, those steps along the way to achieving the target outcome

Active designates the item is currently being used in the system; since many items may not be deleted after they have been used, there is the option of making an item inactive

Program Year is an Application's Operating Year allowing the system to have multiple Applications open simultaneously

Question Templates allow administrators the ability to create multiple Question sets, permitting the additional collection of data

Snapshots are a copy of a Client's Central Intake information used to provide historical Client/Application data

Forecaster is a tool to capture key assumptions used in determining Program Component throughput and monthly estimation of required Client performance

Active designates the item is currently being used in the system; since many items may not be deleted after they have been used, there is the option of making an item inactive

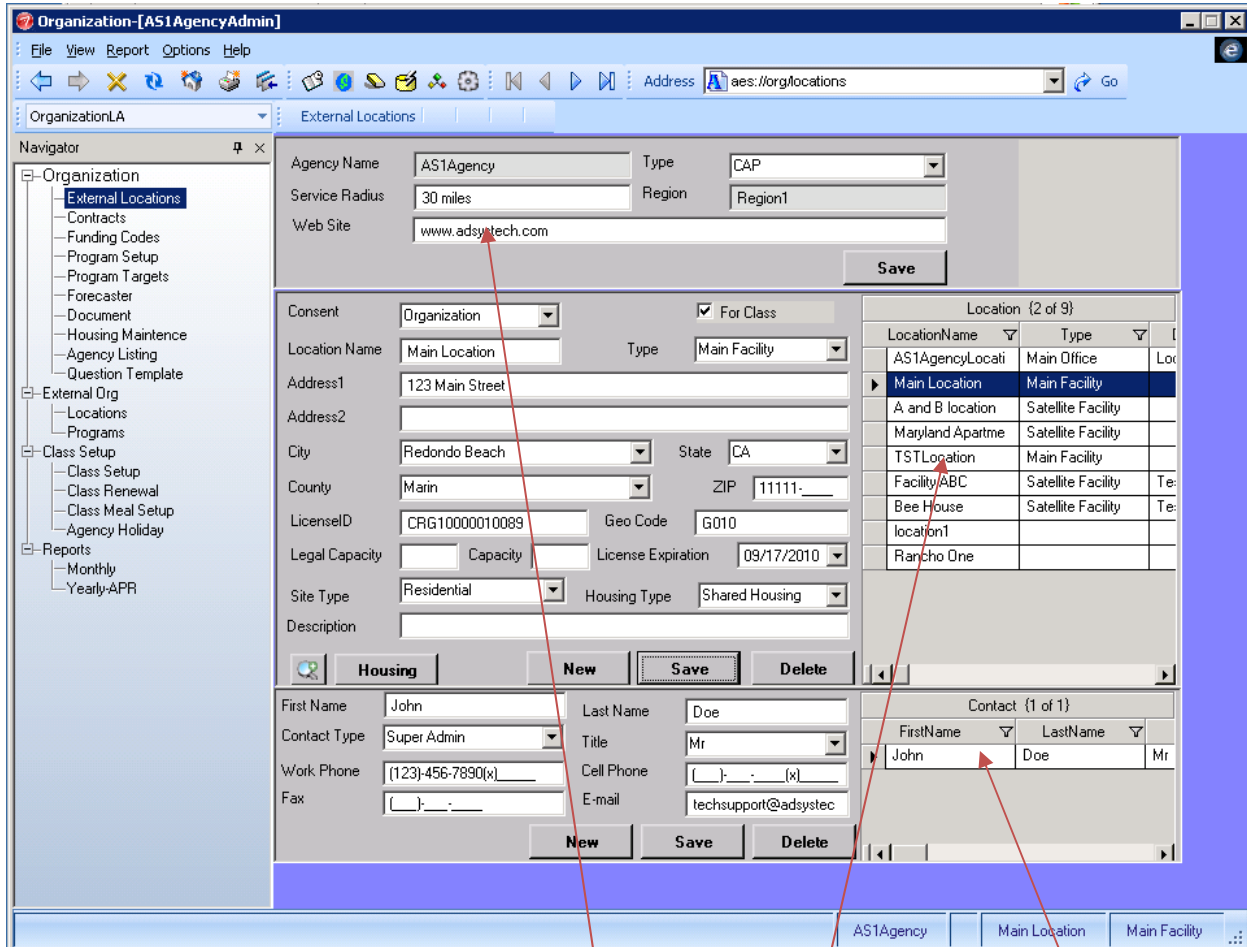
The Basic Process, after exporting from Program Development Web Tool

- 1 Finish Agency information at top of Locations page
- 2 Create Locations and linked Contacts
- 3 Create Contracts and the current year information
- 4 Link Contracts to Performance Measure
- 5 Add Contract Contact information
- 6 Link Funding Code to Contract(s)
- 7 Add Program detail information
- 8 Link Locations to Program
- 9 Add additional Program Components if needed
- 10 Add additional Activities if needed and add details for existing Activities
- 11 Add additional Milestones if needed
- 12 Link Milestones to Contracted Target Areas
- 13 Generate Forecast

Location Page

Create and manage Locations and Contacts linked to those Locations. One Location may have multiple Contacts linked to it. A Location displayed on this page will be a choice on the Start page when a User logs in to Engenuity.

Locations created in the Program Development Web Tool for Head Start will appear on this page automatically.



Navigating the Location Page

- Agency information will automatically appear in the top section
- New Locations will be created in the middle section and appear in the LOCATION GRID
- All Contacts linked to the selected Location will be created in the bottom section and appear in the CONTACTS GRID in the bottom section

Update Agency Information

- 1 Agency and Region names will appear automatically in top section
- 2 Select Type of Organization in type dropdown
- 3 Enter Service Radius
- 4 Enter Web Site
- 5 Click SAVE button

Create New Location

- 1 Click NEW button in middle section
- 2 Select Consent
 - a This determines who can access this record; Organization will keep information available only to the Agency
- 3 Enter Location Name
- 4 Select Type of location
 - a Several reports use the Contact linked to the location listed as Main Facility
- 5 Enter Address information
- 6 Enter License information if needed
- 7 Enter GEO code if HMIS location
- 8 Select Site Type for HUD if needed
 - a Non-residential
 - b Residential: special needs and non-special needs
 - c Residential: special needs only
- 9 Enter Housing type for HUD if needed
 - a Mass shelter/barracks
 - b Dormitory/hotel/motel
 - c Shared housing
 - d Single Room Occupancy (SRO) units
 - e Single apartment (non-SRO) units
 - f Non applicable: non-residential program
- 10 Enter Description of Location
- 11 Click SAVE button
 - a Use DELETE to delete Location record
- 12 Repeat for additional Locations

Create Contact for Location


- 1 Select Location to add Contact in LOCATION GRID
 - a Each Location has its own Contact(s)
- 2 Click NEW button in bottom section
- 3 Enter First and Last Name
- 4 Enter Contact Type
- 5 Enter Phone and Email contact information
- 6 Click SAVE
 - a Use DELETE to delete Contact record
- 7 Repeat for additional Contacts,
The Location may have as many contacts as needed.

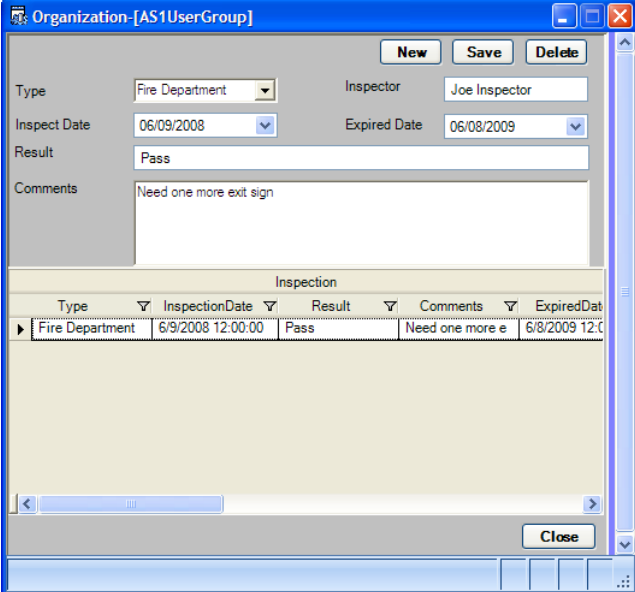
➤ *Make sure to have the correct Location selected when entering Contact information*

➤ *Anyone who should display as the contact for an internal Referral should be added here*

Record Inspection Information for Location

Inspection information is not required, but is available for Agency's use.

- 1 Select Location in LOCATION GRID 
- 2 Click INSPECTION icon button
- 3 In the popup window, click NEW button
- 4 Select Type of Inspection
- 5 Enter Inspector Name
- 6 Select Inspection Date
- 7 Select Expiration Date
- 8 Enter Result of Inspection
- 9 Enter Comments if needed
- 10 Click SAVE button
 - a Use DELETE button to delete Inspection record
- 11 Click CLOSE button



Organization-[AS1UserGroup]

New Save Delete

Type: Fire Department Inspector: Joe Inspector

Inspect Date: 06/09/2008 Expired Date: 06/08/2009

Result: Pass

Comments: Need one more exit sign

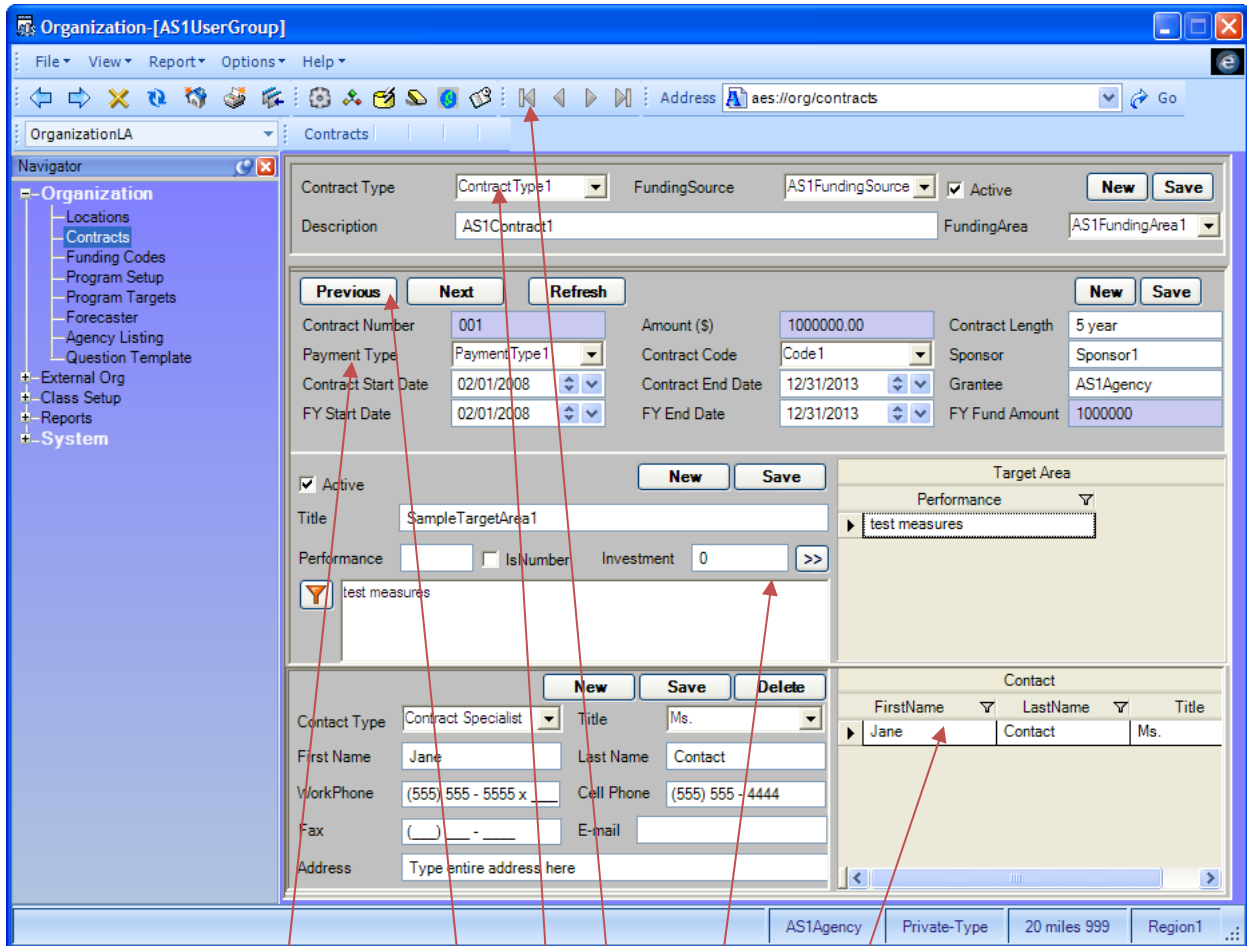
Type	InspectionDate	Result	Comments	ExpiredDate
Fire Department	6/9/2008 12:00:00	Pass	Need one more e	6/8/2009 12:00:00

Close

Contracts Page

Use this page for adding and managing all Contracts and Grantee information for the Organization. Use the blue arrows in the toolbar to navigate from one Contract to the next, and the Previous & Next buttons to move from one Contract year to the next within a Contract.

Each Contract can be linked to one or more Target Areas and one or more Contacts.



Navigating the Contracts Page

- Contracts will be created and shown in the top section;
 - Navigate between them with blue toolbar arrows
- Current year of Contract is created and shown in second section;
 - Navigate between the Contract Year records with PREVIOUS and NEXT buttons
- Linked Performance Measures will be created and displayed in third section
- Contacts for Contracts will appear in bottom section in CONTACT GRID

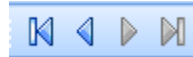
Create new Contract

- 1 Click NEW button in top section
- 2 Select Contract Type
- 3 Select Funding Type
- 4 Click to create checkmark in Active checkbox
- 5 Enter Description of Contract; this name will be used on Funding Code page
- 6 Select Funding Area
- 7 Click SAVE button in top section

► *The Contract Type, Funding Type and Description are all displayed in other places; they will help to identify this Contract*

View Contract

- 1 Use blue Toolbar arrows to scroll between available Contracts



Create Current Contract Year record in Contract Detail

- 1 Make sure correct Contract is selected in top section
- 2 Click NEW button in second section
- 3 Enter Contract Number
 - a This name appear on Reports
 - b This name is also used as a Parameter in reports, so make sure it is identifiable
- 4 Enter Amount of Contract
- 5 Enter Contract Length
- 6 Select Payment Type
- 7 Enter Contract Code
- 8 Enter Sponsor
- 9 Enter Contract Start and End Date
- 10 Enter Grantee
- 11 Enter FY Start and End Date
- 12 Enter FY Fund Amount
- 13 Click SAVE button in second section
 - a See Annual Tasks section for information about renewing Contract


► *The Contract Number must be unique; each fiscal year detail record of a Contract must have a unique Contract Number*

► *The Contract Number field is used as a Parameter on some reports, so make sure it is easily identifiable; it helps to refer to the Contract year and to the Program in the name*

View Current Year of Contract

- 1 Select CONTRACT in top section
- 2 Click PREVIOUS or NEXT button to navigate between year records of Contract

Link Contract to Performance Measure

- 1 Make sure correct Contract is selected
 - a Use blue arrows in toolbar to select correct Contract
- 2 Click NEW button in third section
- 3 Click PERFORMANCE MEASURE icon button 
 - a Performance Measures must be set up first on the Investor Target and Target Area pages in the System section
 - b Performance Measures linked to a Contract here will be available to be linked to a Milestone
- 4 Select the Measure in popup window
- 5 Click SELECT button in popup window
- 6 Click to create checkmark in Active checkbox
- 7 Enter Title for Performance Measure
 - a To copy and paste Performance Measure for Title:
 - i) Highlight the information in the performance Measure box
 - ii) Press CTRL and C keyboard keys
 - iii) Click in the Title field
 - iv) Press CTRL and V keyboard keys
- 8 Enter Performance Number
 - a This is the number of people the Agency states in the contract to reach this performance measure
 - b If number, rather than percentage, click to check in Is Number checkbox
- 9 Click SAVE button in third section
- 10 Repeat for each additional Performance Measures
- 11 Repeat for additional Contracts

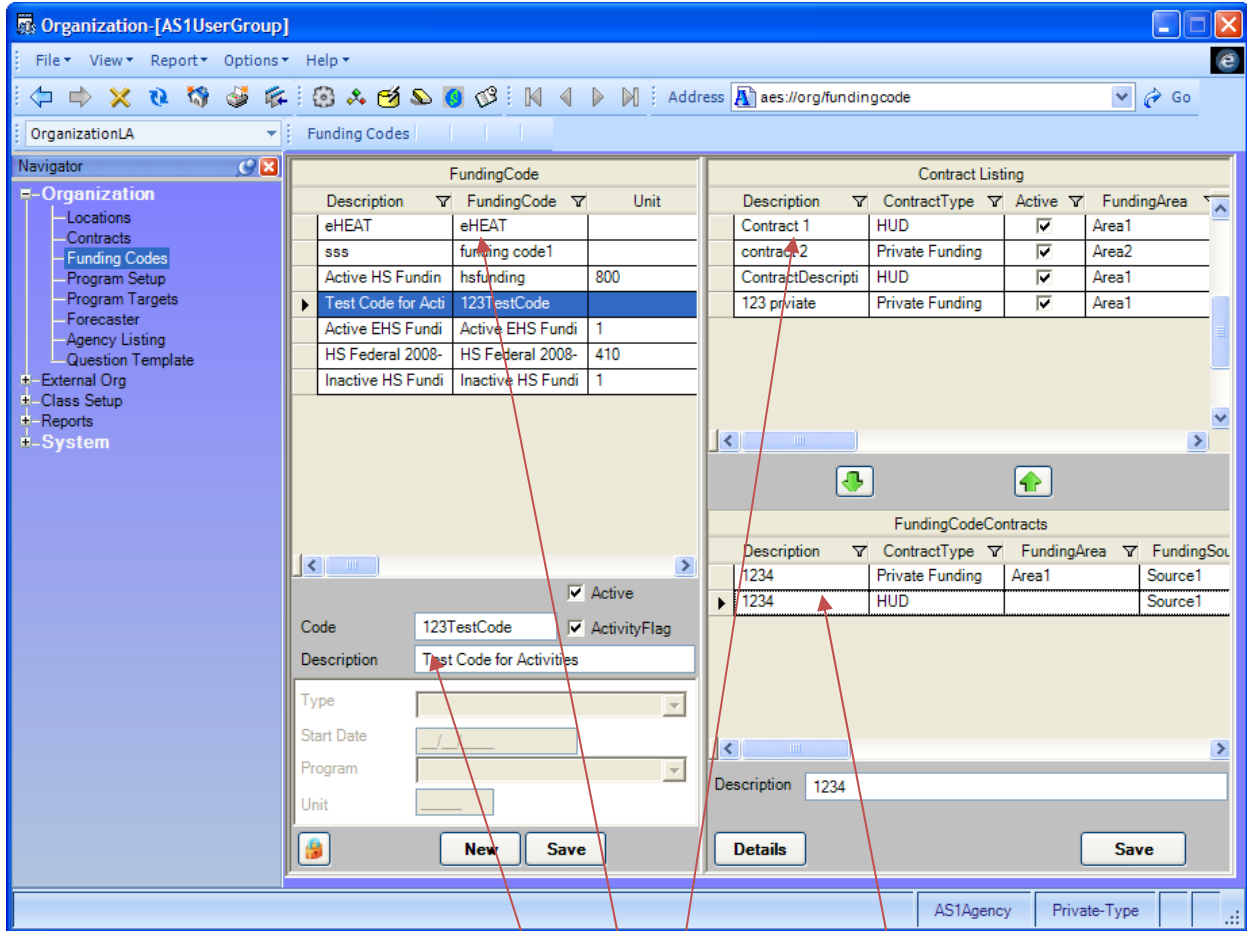
Create Contract Contacts

- 1 Make sure correct Contract is selected
- 2 Click NEW in bottom section
- 3 Select Contact Type
 - a This is a requirement for some reports
- 4 Enter First and Last Name
- 5 Enter Phone, Email and Address information
- 6 Click SAVE button
- 7 Repeat for additional Contacts

Funding Codes Page

Funding Codes are used only to link Activities with the Funder who is paying for them. The Funding Code can be associated with one or with many established Contracts. The Activity Flag checkbox designates a Funding Code used for Activities; if the box is not checked, it designates a Funding Source, currently used by Head Start.

Funding Codes created in the Web Tool will appear here, but will still need to be linked to a Contract.



Navigating the Funding Codes Page

- All existing Funding Codes will be listed in the FUNDING CODE GRID
- New Funding Codes will be created in lower left section
- All available Contracts will appear in the CONTRACT LISTING GRID
- All linked Contracts to the selected Funding Code will appear in the FUNDING CODE CONTRACT GRID



Create a Funding Code

- 1 Click NEW button
- 2 Enter Funding Code name
- 3 Click to create checkmark in Activity Flag checkbox
- 4 Click to create checkmark in Active checkbox
- 5 Enter Description
- 6 Click SAVE button
 - a Funding Code appears in FUNDING CODE GRID

► Funding Codes are not used in any reports; they are used only to provide a link between Contracts and Activities

► More than one Contract can be linked to a Funding Code; a Contract can be linked to multiple Funding Codes

Link Funding Code to Contract

- 1 Select Funding Code in FUNDING CODE GRID on left side of page
- 2 Select Contract in CONTRACT LISTING GRID in right side of page
- 3 Click DOWN ARROW icon button 
 - a Link appears in FUNDING CODE CONTRACTS GRID at bottom of right side of page
 - b Use UP arrow to remove link from Funding Code 
- 4 Enter Description
- 5 Click SAVE button on right side of page
- 6 Repeat for additional Contracts to link to Funding Code

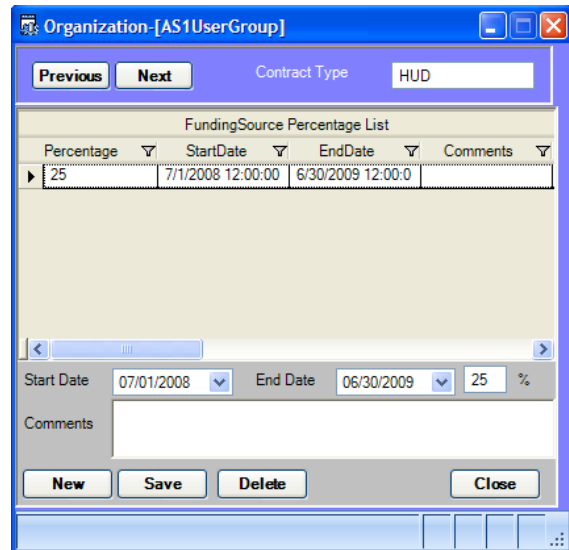
► If a Contract does not appear in the Contract Listing Grid, make sure the Active checkbox is marked on the Contracts page; if it is marked, click the REFRESH button in the toolbar to update the page

Allocate percentages and dates to different Contracts in Funding Code

If more than one Contract is linked to a Funding Code, each one can be set up to contribute a specific percentage of the funds and the dates the contribution exists.

- 1 Select Funding Code in FUNDING CODE GRID on left side of page
 - 2 Click DETAILS button
- In the popup window
- 3 Select Start and End Dates
 - 4 Enter percentage that this Contract will contribute
 - 5 Enter comments
 - 6 Click SAVE
 - 7 Use NEXT and PREVIOUS buttons at top to bring up other Contracts linked to this Funding Code
 - 8 Repeat process for each Contract
 - 9 Click CLOSE when finished

This process will need to be redone each Contract Year since it is tied to specific Start and End Dates.




Percentage	StartDate	EndDate	Comments
25	7/1/2008 12:00:00	6/30/2009 12:00:00	

Start Date: 07/01/2008 End Date: 06/30/2009 25 %

Comments:

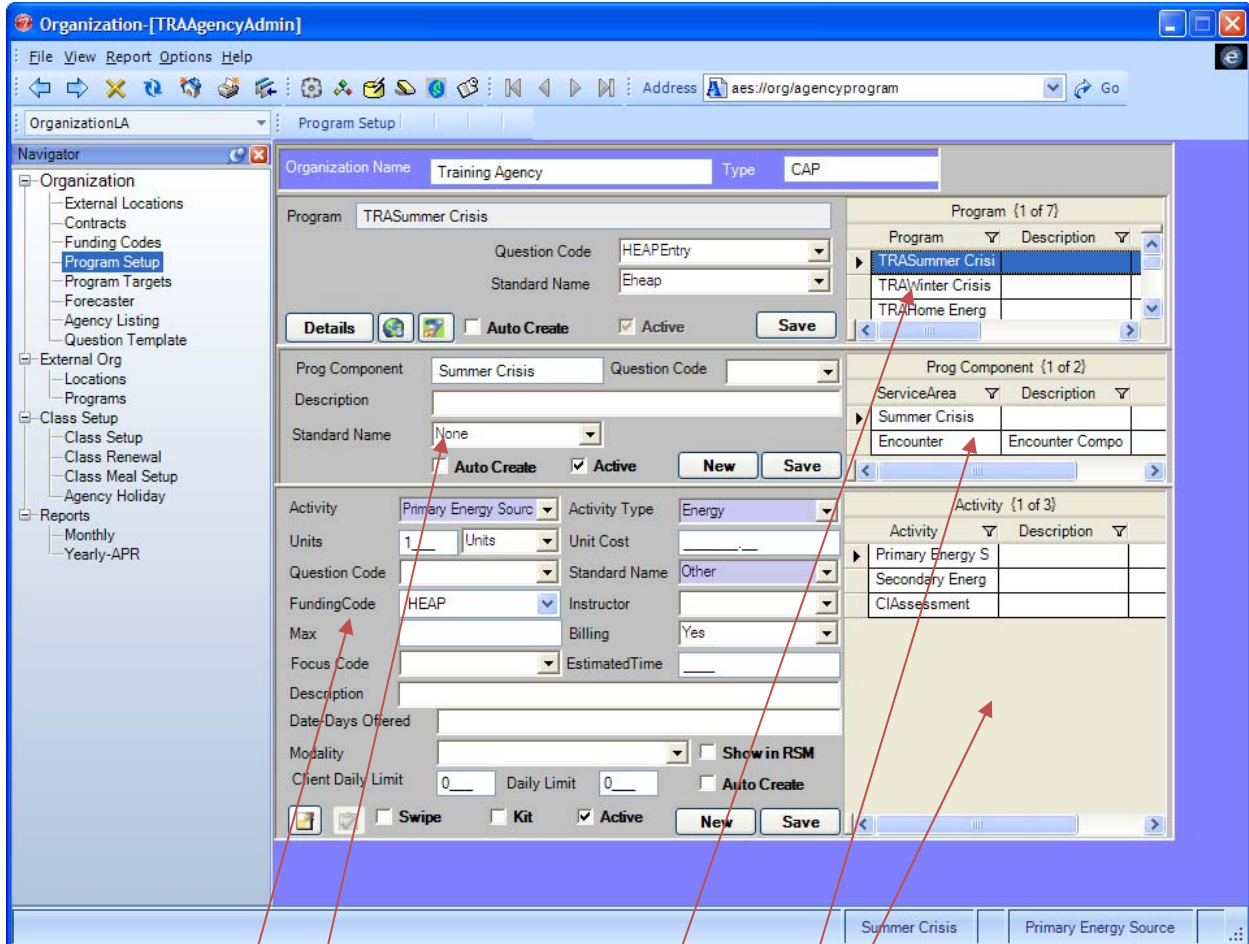
New Save Delete Close

Lock Funding Code

- 1 Select Funding Code in FUNDING CODE GRID on the left side of page
- 2 Click the LOCK icon button 
- 3 A warning message will appear asking if you want to continue
- 4 Click YES button
 - a Funding code is now frozen and may not be changed

Program Setup Page

Programs are created in the Security Manager and Web Tool; once created there, they will then appear on this page. Program Components and Activities are also created in the Web Tool, but may also be added on this page. The Auto Create checkbox designates the Program, Program Component and Activity as being able to be automatically generated.



Navigating the Program Setup Page

- All available Programs will be listed in the PROGRAM GRID
- All Program Components created in the Web Tool will appear in the PROGRAM COMPONENT GRID
 - Additional Program Components will be created in the left middle section
- All Activities created in the Web Tool will appear in the ACTIVITY GRID
 - Additional Activities will be created in the left bottom section

Complete Program Setup

- 1 Make sure correct Program is selected in the PROGRAM GRID
- 2 Enter or select Question Code at the top of page
 - a Entering a new Question Code enables that code on the Question Template page
- 3 Select Standard Name
- 4 If the Program will be automatically generated (as with a Swipe Card), click to create a checkmark in the Auto Create checkbox
- 5 Make sure there is a checkmark in the ACTIVE checkbox
- 6 Click SAVE button in top section

Complete Program Details

- 1 Click DETAILS icon button to open Details popup

First section

- 2 Select Category
 - a These are set up on the Dropdowns page
- 3 Select Auto Create Mode
 - a Determines who will be entered in Program – Individual, Family, Household
- 4 Select Focus Code
 - a This determines what appears in the income snapshot at Program Entry
 - b Also determines who appears on the Client Demographic reports
- 5 Select Program Start and End dates
 - a If dates are invalid, message will be displayed (i.e. 2/30, 11/31)
- 6 Select Target Population
 - a This field can determine data to be used on reports
 - b Field can also be linked to a rule on Rules page
- 7 Enter Project Name
- 8 Enter Duration
- 9 Select Poverty Level type
- 10 Enter Program Description

Second section

- 11 Select Exit Date for Clients to be exited out of Program
 - a Note since this date involves a year, it will need to be reset for each Program year
- 12 Select Closeout Mode:
 - a Exit = exit Client out of the Program at the date selected
 - b Renew = exit Client out of the current application and create a new application with associated Program Components and Milestones; the Operation Year of the new Application is the next sequential OY
 - c Ongoing = moves the Client to the new Operation Year without adding a new application
 - o A Customer enrolls in the Program a single time
 - o A Customer continues to receive Program Services over multiple years
 - o All Customers enrolled in the Program are always in the current Operation Year
 - o A Case Manager does not have to remember which Operation Year a particular Customer enrolled in the Program


The screenshot displays the 'Organization - [AS1UserGroup]' window. At the top, there are 'Prev', 'Next', and 'Program AS1HMIS' buttons, along with a 'Close' button. The main form contains several sections:

- Category:** HMIS (dropdown), AutoCreateMode: Household (dropdown), Save button.
- Focus Code:** Individual (dropdown), Program Start (MM/DD): 01/01, Program End (MM/DD): 12/31.
- Target Population:** Individual (dropdown), Project Name: Homeless management syst, Duration: 12_.
- Poverty Level Type:** HMIS (dropdown).
- Program Description:** Homeless management system.
- Comments:** A homeless person is someone who is living on the street or in an emergency shelter, or who would be living on the street or in an emergency shelter without the SHP assistance. A person is considered homeless only when...
- Warning:** All applications for this program for the previous operation year will be exited close of business day for the date specified.
- Exit Date:** 10/22/2111 (dropdown), Closeout Mode: Exit (dropdown).
- STDName List:** A table with columns: Category, STDName, Condition. Rows include 'SampleCategory1' with 'Age > 30' and 'Select * From [Cu]'. A '2' is entered in the 'Condition' column.
- Program STDServices:** A table with columns: STDName, Condition, STI. Rows include 'Age > 30' with 'Select * From [Cu]' and '100', and 'Age > 50' with 'Select * From [Cu]' and '101'.
- Agency Contact Listing:** A table with columns: LocationName, ContactType, FirstName. Rows include 'AS1AgencyLocati' with 'Case Worker' and 'Isabel', and 'Location 1' with 'rrrrr'.
- Referral Consent:** A dropdown menu.
- Program Contacts:** A table with columns: LocationName, ContactType. Rows include 'AS1AgencyLocati' with 'Staff'.

At the bottom right, there are buttons for 'AS1Agency' and 'Private-Type'.

- The search for a Customer enrolled in the Program does not involve multiple Program Applications over multiple Operation Years since the Operation Year for all Customers enrolled in the Program is always the same


Third section

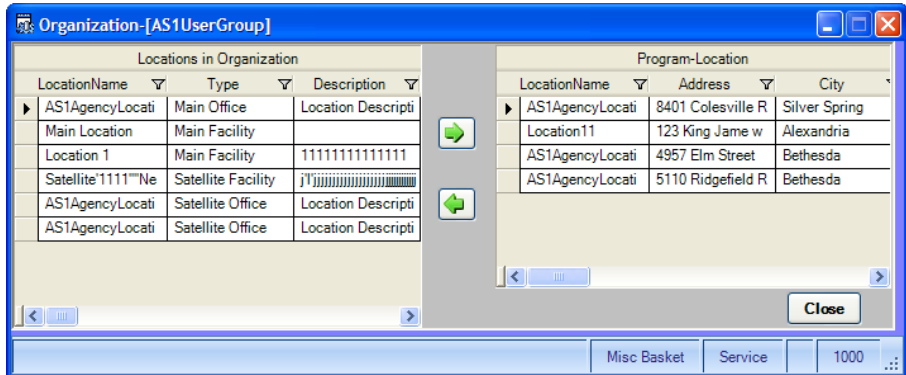
- The left side lists all Category/STD Names combinations; select any of the combinations that should be linked with this Program
 - The items listed in this Grid are set up on the STD Names page 
- Click RIGHT ARROW button
 - STD Name will appear in PROGRAM STD SERVICES GRID on right side of third section
 - To remove a referral link, click the LEFT ARROW button

Fourth section

- AGENCY CONTACT LISTING GRID shows all the Contacts that were created for the Agency on the Location page
- Select the appropriate Contact(s) for this Program
 - These are the Contact(s) who will show up on the Referral Page as the person(s) to refer Clients to
- Select the appropriate level of consent for this Contact
 - This will determine who can refer Clients to this Contact
- Click the RIGHT ARROW button
 - The Contact will appear in the PROGRAM CONTACTS GRID on the right side
 - Use the LEFT ARROW button to remove a Contact
- Click SAVE button at top of popup window
- Click PREV or NEXT button to view a different Program; if needed, repeat steps for that Program
- Click CLOSE button at top of popup window when finished


Link Locations to Program

- Make sure correct Program is selected in PROGRAM GRID
- Click LOCATIONS  Icon button
 Popup window will display all Locations created on Locations page.
- Select Location to link to this Program in LOCATIONS IN AGENCY GRID on the left side
- Click RIGHT ARROW button
 - LEFT ARROW button removes Location
- Locations will appear in PROGRAM-LOCATION GRID on the right side
- Repeat for additional locations, if needed
 - Locations for HMIS Programs can be linked to only one Program
- Click CLOSE button
- Repeat for each Program



Set HUD Parameters

This information is required only for HMIS Programs.

- Click SET HUD PARAMETER icon button 
- In popup window:
- Click NEW button
 - Select Valid from and to Dates
 - Select or enter FPS code
 - Select or enter Facility Code
 - Select or enter CoC Code

- 7 Select Program Type Code
 - a Emergency Shelter or Prevention Services
 - b Required for some reports
- 8 Select Program Site Configuration Type
 - a Single site, single building
 - b Single site, multiple buildings
 - c Multiple sites
- 9 Select Tracking Method
 - a 0 = Program Entry and Exit Date Comparison
 - b 1 = Bed Management Model
 - c 2 = Service Transaction Model
- 10 Click SAVE button
 - a Use DELETE button to remove unwanted record
- 11 Click CLOSE button when finished

Create additional Program Components 6.5 - Service Counts

All Program Components exported from the Web Tool will appear in the PROGRAM COMPONENT GRID in the right middle section automatically. To create a new Program Component:

- 1 Click NEW button in middle section
- 2 Enter Program Component name
- 3 Enter Description
- 4 Select Standard Name
- 5 Click to create checkmark in Active checkbox
- 6 If the Program Component should be automatically generated with a Client enters the Program, click to create a checkmark in the Auto Create checkbox
- 7 Click SAVE button
 - a Program Component will appear in the PROGRAM COMPONENT GRID on the right side of the middle section
- 8 Repeat for additional Program Components

► Program Components may have the same name as one in a different Program, but must be unique within the Program

Create additional Activities

All Activities exported from the Web Tool will appear in the ACTIVITY GRID in the right bottom section automatically.

- 1 Make sure the correct Program Component is selected in the PROGRAM COMPONENT GRID, since Activities are linked to the Program Component
- 2 Click NEW button in bottom section
- 3 Enter **Activity Name**
- 4 Select **Activity Type** (see Activity Type description on next page)
- 5 Enter # of Units
 - a This is what will appear as default for Activity, but may be changed on some pages, including Services
- 6 Select Unit Type
 - a This will appear as the default Unit Type on the pages to record Activities
 - b Minute, Day, Unit, Dollars
 - c Select Cost if Cost field is needed along with End Date field; this will also display a Total Cost when the User saves the activity; this is calculated by number of units entered x Unit Cost
- 7 Enter Unit Cost
 - a This is used in several reports to calculate cost of service delivered


► Required fields in the Activity section are shaded light blue; they include:

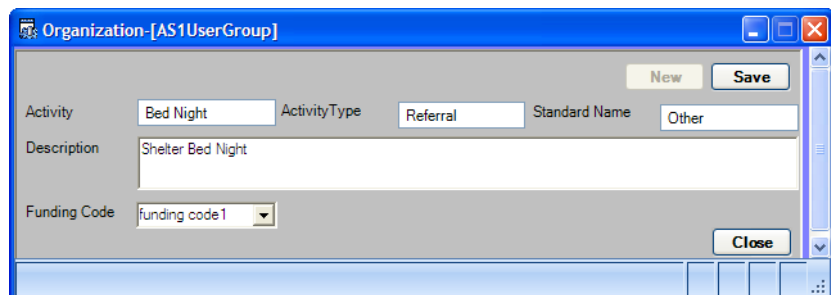
- Activity Name
- Activity Type
- Standard Name
- Funding Code

- b Do not use \$ dollar sign
- 8 Select Question Code
 - a This is only required if Activity Type = Profile
 - b Entering a new Question Code here will enable that question code on the Question Template page
- 9 Select **Standard Name**
 - a This groups Activities into standard categories for reporting
 - b It may also determine the kind of billing function
- 10 Select **Funding Code**
 - a All Funding Codes created on Funding Code page will appear here
- 11 Select Instructor
 - a This is used only for Session Activities
- 12 Enter Max
 - a This is used to designate the maximum number of beds available for HMIS programs and the number of days a child may be enrolled in Head Start before this Health Activity needs to be completed
- 13 Select Billing
 - a Yes if the Activity needs to be billed
- 14 Select Focus Code
- 15 Enter Estimated Time the Activity should take
 - a This can be used to set a time for activities that will be scheduled in Resource Manager
- 16 Enter Description of Activity
- 17 Enter Date-Days offered
 - a This is used only for Session Activities
- 18 Select Modality if needed
- 19 Enter Client Daily Limit
 - a This is the maximum number of instances of this service that a Client may receive in one day, used only for Swipe Services
- 20 Enter Daily Limit
 - a This is the maximum number of times this service can be rendered in a day, used only for Swipe Services
- 21 Click to create checkmark in Active checkbox
- 22 If the Activity should create an appointment in Resource Manager to be scheduled, click to create a checkmark in the Show in RSM checkbox
- 23 If the Activity should be automatically created for a Client when the Program Component is created, click to create a checkmark in the Auto Create checkbox
- 24 If the Activity will be part of a Swipe Card Program, click to create a checkmark in the Swipe Card checkbox
- 25 If the Activity includes a kit given to Client that will be reported, click to create a checkmark in the Kit checkbox
- 26 Click SAVE in bottom section
 - a Activity will appear in ACTIVITY GRID
- 27 Repeat for additional Activities

Add Activity as Referral Activity

These Activities will appear in the Activity dropdown when making an internal Referral.


- 1 Select the Activity that should appear as Referral Activity in ACTIVITY GRID
- 2 Click REFERRAL icon button 
- 3 In popup, click NEW button
Activity, Activity Type and Standard Name will populate themselves from ACTIVITY GRID
- 4 Enter Description

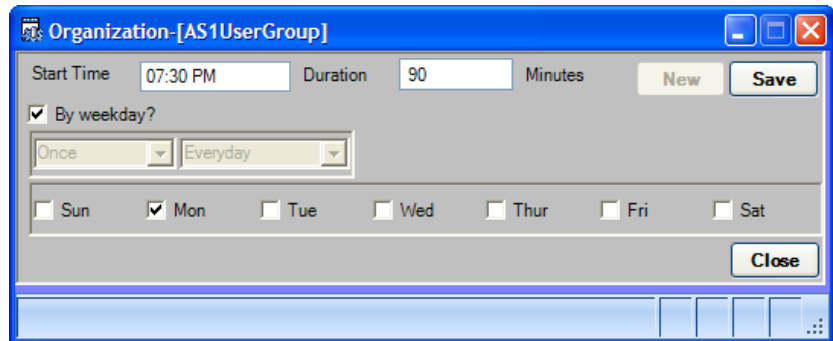


The screenshot shows a web form titled "Organization-[AS1UserGroup]". It contains several input fields: "Activity" with the value "Bed Night", "ActivityType" with "Referral", and "Standard Name" with "Other". The "Description" field contains "Shelter Bed Night". The "Funding Code" field has a dropdown menu showing "funding code1". There are "New", "Save", and "Close" buttons at the top and bottom right of the form.

- 5 Select Funding Code
- 6 Click SAVE button
- 7 Click CLOSE button

Set up Session

- 1 Select the Session Activity to be scheduled in ACTIVITY GRID
- 2 Click the EDIT SESSION  button to open popup
- 3 In the popup window, click NEW button
- 4 Enter Start Time
- 5 Enter Duration
- 6 If scheduling by weekday:
 - a Click to create checkmark in BY WEEKDAY? Checkbox
 - b Click in day checkbox
- 7 If scheduling everyday, select Once and Everyday in dropdowns
- 8 Click SAVE
- 9 Click CLOSE



The screenshot shows a window titled "Organization-[AS1UserGroup]". It contains the following fields and controls:

- Start Time: 07:30 PM
- Duration: 90 Minutes
- Buttons: "New" and "Save"
- Checkbox: "By weekday?" (checked)
- Dropdowns: "Once" and "Everyday"
- Day checkboxes: Sun (unchecked), Mon (checked), Tue (unchecked), Wed (unchecked), Thur (unchecked), Fri (unchecked), Sat (unchecked)
- Button: "Close"

Activity Types

- **Assessment:** the activity and related questions will appear on the Profile page in central Intake
- **Bed:** the activity will appear on the Bed Assignments page
- **Case:** the activity will appear on the Case Notes page; User can enter narrative for activity
- **Class:** the activity will appear on the Class Enrollment and Attendance pages
- **Daily:** the activity will appear on the Daily Services page in the Group Activities section
- **Encounter:** the activity will appear on the Encounter pages
- **Energy:** the activity will appear on the Energy or HPRP Lite or HPRP Standard page
- **EnrollProfile:** the activity and related questions will appear on the Head Start Enrolled Client Profile page
- **Health Screening:** the activity will appear on the Head Start Health Screening page
- **Health Treatment:** the activity will appear on the Head Start Follow up Health Services page
- **HSFamilyServices:** the activity will appear on the Head Start Family Services page
- **Permission:** the activity will appear on the Head Start Permission page
- **Profile:** the activity and related questions will appear on the Profile page
- **Service:** the activity will appear on the Services page Activity dropdown (bottom of the page) and in the Services dropdown on the Case Notes page
- **Session:** the activity is delivered to a group of Clients at one time, like Workshops or Counseling sessions, and will appear on the Session page in the Group Activities section

A Profile/Assessment will appear on the Profile/Eligibility page in Central Intake only if:

- A Program is created called Central Intake (in Security Manager)
 - This program will not be visible in Program dropdowns on Entry or Listing pages
- The Program has a Standard Name and a Question Code which will determine questions to appear on Profile/Eligibility page

An Activity will appear in the Encounter module only if:

- A Program Component is created with a Standard Name of Encounter
- An Activity is created in that Component with an Activity Type = Encounter and Standard Name = Encounter

An Activity will appear in Resource Manager for scheduling only if:

- The Activity has Show in RSM checkbox checked and Estimated Time is filled in

An Activity will appear in HPRP pages (HPRP Standard and HPRP Lite) only if:

- The Activity has Activity Type as Energy
- If the Billing Module will be used (only available with HPRP Standard, not HPRP Lite), Billing field must be YES

HMIS Service Standard Names

HPRP Services

- Rental assistance
- Security deposits
- Utility deposits
- Utility payments
- Moving cost assistance
- Motel & hotel vouchers
- Case management
- Outreach and engagement
- Housing search and placement
- Legal services
- Credit repair

HMIS Optional Services

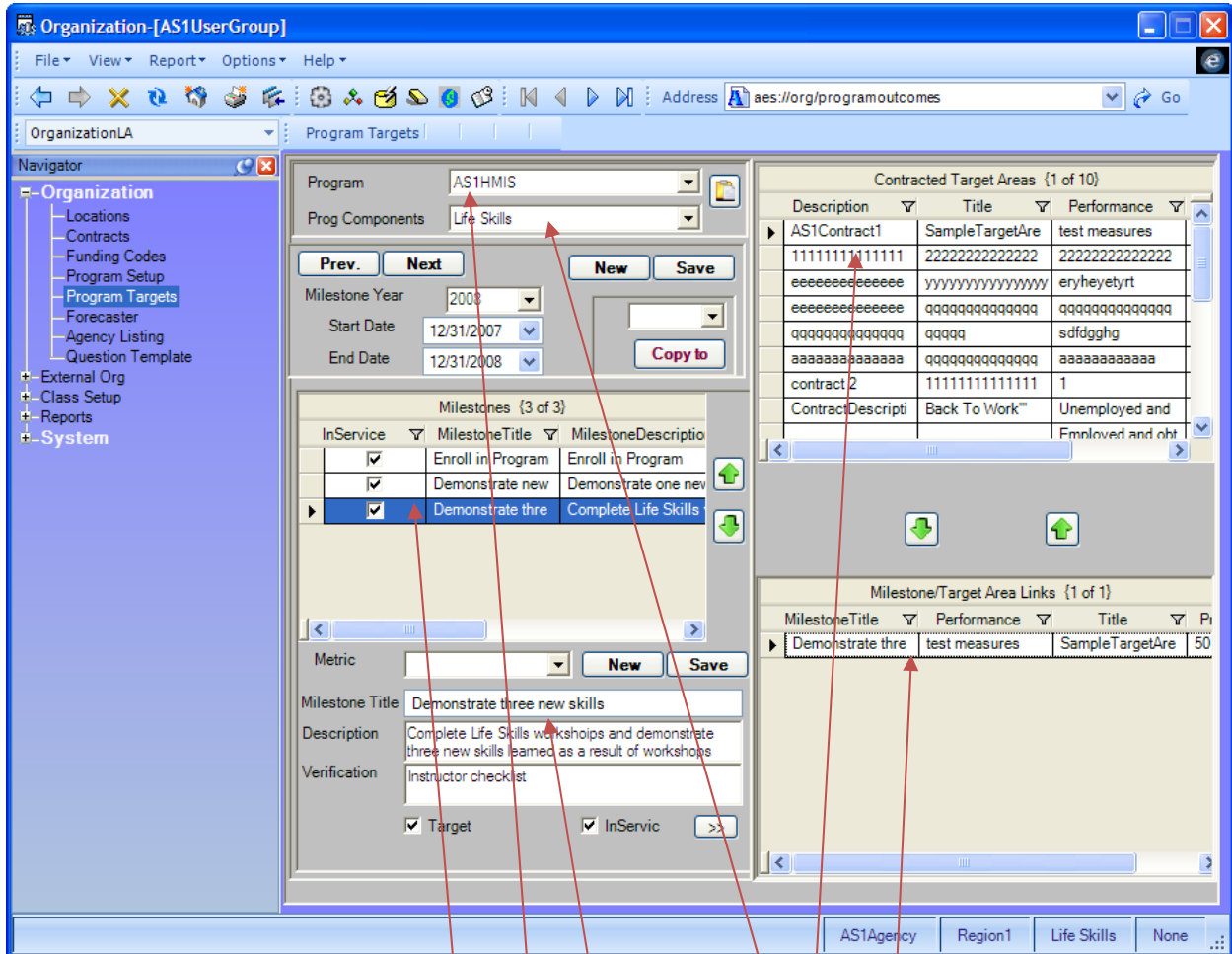
- Food*
- Housing placement*
- Material goods*
- Temporary housing and other financial aid*
- Transportation*
- Consumer assistance and protection*
- Criminal justice/legal services*
- Education*
- HIV/AIDS-related services*
- Mental health care/counseling*
- Other health care
- Substance abuse services*
- Employment*
- Case/care management*
- Day care*
- Personal enrichment*
- Referral to other service(s)
- Outreach*

Services with * were included in former Data Standard

Program Targets Page

Milestones created in the Web Tool will appear on this page, along with the Description, Verification, Operation Year and Start and End Dates. Milestones can be linked to Target Areas on this page; the Target Areas that appear at the top of the page are the same Target Areas that were linked with a Contract on the Contracts page. Milestones may not be deleted when part of an active Program Component, but they may be made inactive.

Activities will not appear for Clients unless there is at least one Milestone active in the Program Component.



Navigating the Program Targets Page

- All available Programs appear in the Programs dropdown
- All Program Components of the selected Program will be listed in the Program Component dropdown
- All Milestones appear in the MILESTONES GRID
- New Milestones will be created in the bottom section
- All Contracted Target Areas will appear in the CONTRACTED TARGET AREAS GRID
- All Target Areas linked to selected Milestone appear in MILESTONES/TARGET AREA LINKS GRID

View Milestones of a Program Component

- 1 Select Program in the Program dropdown at the top of page
 - 2 Select Program Component in the dropdown
 - 3 Select the current year with PREV or NEXT buttons
- Milestones appear in the MILESTONE GRID.
- 4 To view a different year's Milestones, click PREVIOUS or NEXT button
 - 5 To view only Milestones that are no longer in service, click the << button at bottom of page
 - a The button becomes >>, click it again to bring back all Milestones

► *If Milestones are added during the Milestone Year, those changes will not automatically appear on a Client's Service page if the Program Component has already been generated. When changes are made, Users should be instructed to use the REFRESH MILESTONES button located in the Milestone section of the Services page*



Create New set of Milestones

If the Program Development Web Tool was used, the Milestones will already appear on this page.



- 1 Select Program in the Program dropdown at the top of page
- 2 Select Program Component in the dropdown
- 3 Select the current year with the PREV or NEXT buttons
- 4 If the Milestones appear, do not click NEW button,
 - a To create new year of Milestones, see *Copy Milestones of a Program Component to new Milestone Year* below
- 5 If the Milestones do NOT appear, click NEW button at top
- 6 Select Milestone Start Date
- 7 Select Milestone End Date
- 8 Click SAVE button in top section
- 9 If creating Milestones, click NEW button in bottom section
- 10 If not creating Milestones, each one may be edited by selecting it in MILESTONES GRID
- 11 Enter Milestone Title
 - a This should be concise, it will appear on reports
- 12 Enter Description
 - a The description allows more space for information about the Milestone, while the Title is concise
- 13 Enter Verification
 - a This is how the User will know that a Client has achieved this Milestone
- 14 Make sure In SERVICE checkbox is checked
- 15 Click SAVE when done
 - a Milestone appears in MILESTONE GRID
- 16 Repeat above steps for each additional Milestone
- 17 For Target Milestone, click to create checkmark in Target checkbox
- 18 Click SAVE after each Milestone
- 19 Repeat for each Program Component

► *If coming to this page directly from the Program Setup page, the active Program and Program Component from that page will be active here*

Edit Milestones

- 1 Select Program in the Program dropdown at the top of page
- 2 Select Program Component in the dropdown
- 3 To change order of Milestones, select Milestone in MILESTONE GRID
 - a Click UP ARROW button to move Milestone up one position in sequence 
 - b Click DOWN arrow to move Milestone down one position in sequence 
- 4 To mark a Milestone as Vulnerable or Crisis, select Milestone in MILESTONE GRID
 - a Select Crisis or Vulnerable in Metric dropdown
 - b Click SAVE button
- 5 To make a Milestone inactive, select Milestone in MILESTONE GRID
 - a Click to remove checkmark in IN SERVICE checkbox
 - b Click SAVE button
- 6 If changes are made to Milestone during the Operating Year, for any Program Components that have already been generated for Clients, User will need to use REFRESH MILESTONE button on Client's Service page


Link Milestone to Target Area

- 1 Select Program in the Program dropdown at the top of page
 - 2 Select Program Component in the dropdown
 - 3 Select Milestones to link in MILESTONE GRID
 - 4 Select Target Area in CONTRACTED TARGET AREAS GRID on right side of page
 - a All Target Areas that were linked with a Contract on Contract page will appear here 
 - 5 Click DOWN ARROW button located beneath the grid
 - a Target Area appears in MILESTONE/TARGET AREA LINKS GRID on bottom right section of page
 - b Use UP ARROW to remove Target Area from MILESTONE/TARGET AREA LINKS GRID 
- A Milestone may be linked to multiple Target Areas; a Target Area may be linked to multiple Milestones

Copy Milestones of a Program Component to new Milestone Year

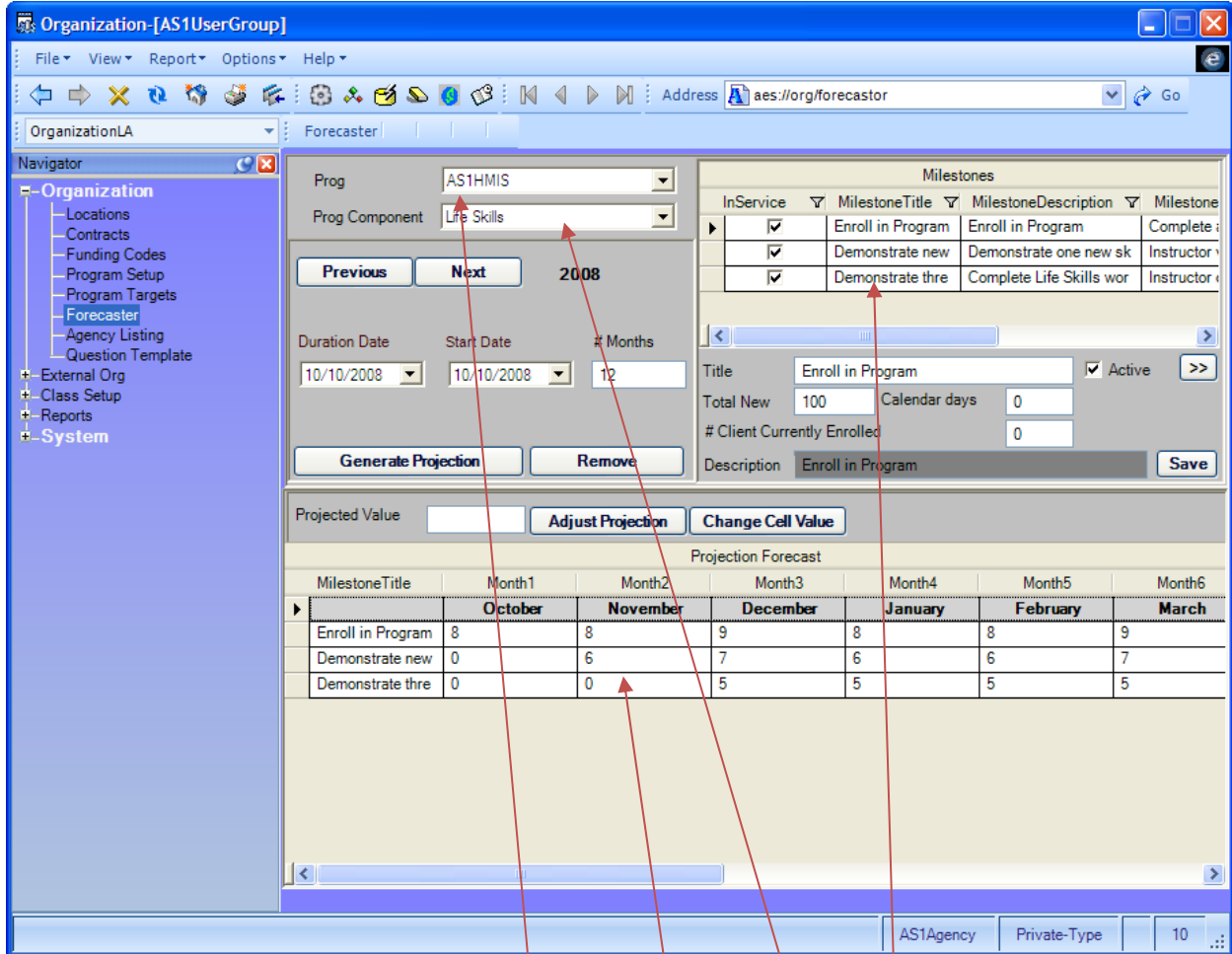
- 1 Select Program in the Program dropdown at the top of page
- 2 Select Program Component in the dropdown
- 3 Select Year to Copy TO in dropdown below NEW and SAVE buttons
- 4 Click COPY TO button
 - a This creates the same set of Milestones for the new Milestone Year
 - b It uses the same Start and End Dates with the new year
 - c It also copies the link with any Target Areas that were created for the copied set of Milestones

Copy Milestones of ALL Program Components of an entire Program to new Milestone Year

- 1 Select Program in the Program dropdown at the top of page
- 2 Click COPY MILESTONES FOR SELECTED PROGRAMS button in the top section 
- 3 Message will appear saying successful copy was completed
- 4 This copies the Milestones for ALL Program Components of the selected Program to the next Milestone Year
- 5 When NEXT button is clicked, Milestone Year will jump to next year, Start and End Date will indicate same dates with new year and Milestones will appear in MILESTONE GRID

Forecaster Page

The Forecaster page creates an accurate projection of Clients who will achieve Milestones and Performance Targets for up to a one-year timeframe. Forecaster requires quantified assumptions representing how many Clients will move from Milestone to Milestone, how many days on average it will take them to move, and where in the process Clients are at the start of the time period. Users can also quantify how new clients enter the Program Component on a month-by-month basis. Once these critical pieces of information are entered, Forecaster will then calculate a four-quarter projection based on the assumptions.



Navigating the Forecaster Page

- All Programs appear in the Program dropdown
- All Program Components of the selected Program will be listed in the Program Component dropdown
- All Milestones of the selected Program Component will appear in the MILESTONES GRID
- The finished Forecast will appear in the PROJECTION FORECAST GRID

Create a Forecast for a Program Component

- 1 Select Program in Program dropdown at top of page
- 2 Select Program Component in dropdown
- 3 Select Start Date
 - a This uses the year only to set the Operation Year and select the correct Milestones
- 4 Select each Milestone in the MILESTONES GRID at the top right section of page and enter the following three numbers -
- 5 Enter Total New number
 - a For Milestone 1: This is how many new Clients are expected to enter the Program in the coming year
 - b For all other Milestones: This is how many new Clients are expected to enter the Program in the coming year
- 6 Enter Calendar Days for Milestone 1
 - a For Milestone 1: This will usually be 0, since it is the day of enrollment
 - b For all other Milestones: This is how many days from the prior Milestone Achievement, *on average*, it is expected to take for clients to achieve this Milestone
- 7 Enter # Clients Currently Enrolled
 - a For all Milestones except the Target: this is the number of currently enrolled Clients expected to be at this Milestone point and still receiving services, but have not achieved the next Milestone yet, when the contract year begins
 - b For the Target: this will always be 0, since once they have achieved the Target, they are done with the Program Component
- 8 Click SAVE after EACH MILESTONE
- 9 Make sure correct Start Date is selected in the middle of page on left
- 10 Select Duration Date
- 11 Select the number of Months
 - a Duration Date may be the same or earlier than the Start date, but may not be later. The # of Months may not be more than the number of months from the Start Date until one year after the Duration Date.
 - b For example, if Duration Date is June 1, Start Date is July 1, the number of months cannot be more than 11
- 12 Click GENERATE button
 - a Projection appear in PROJECTION FORECAST GRID at bottom of page

Modify the Projection

When the projections are generated, the system will split the Total New number entered for Milestone 1 equally between all twelve months. This assumes that people will enter the Program/Program Component (achieve milestone 1) evenly – that the same number of people will start every month.

If the flow of new people entering the Program Component is seasonal (more at one time of the year than another), the number can be manually edited to show what is expected each month:

- 1 Click in the cell in the Milestone 1 row under the Month to change
- 2 Type a new number in the Projected Value box and click the ADJUST PROJECTION button
- 3 Change other month's Milestone 1 number as needed
 - a Note: The Total number for Milestone 1 in the last column in the Projection Forecast Grid should still reflect the Total New number projected above in the MILESTONE GRID

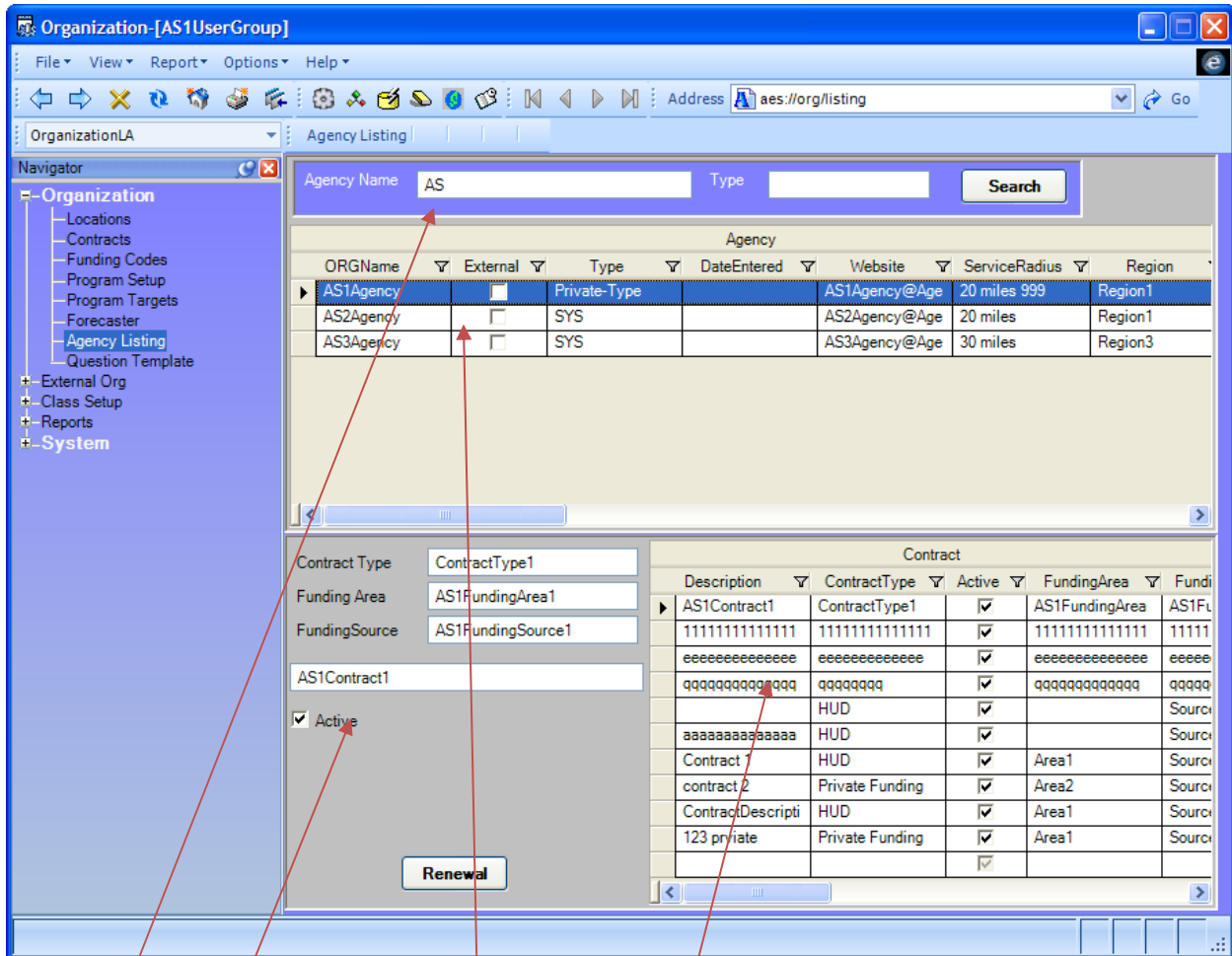
View a different Year's Projection

- 1 Select the year in the bottom part of the screen
- 2 Click FILTER button

Agency Listing Page

If a System Administrator has access to more than one Agency, use this page to select the Agency to use on other Organization pages.

Start the Contracts Renewal process on this page also; see the Annual Tasks section for more information about the Contract renewal process.



Navigating the Agency Listing Page

- Fields to conduct Agency search
- Matching Agencies appear in AGENCY GRID
- All Contracts of selected Organization appear in CONTRACT GRID
- Information for selected Contract appears on left side of page

Select an Organization

All Organizations a User has access to can be viewed on this page

- 1 Enter Agency Name and/or Type in filter fields at top of page
- 2 Click SEARCH button
- 3 All matching Organizations will appear in AGENCY GRID

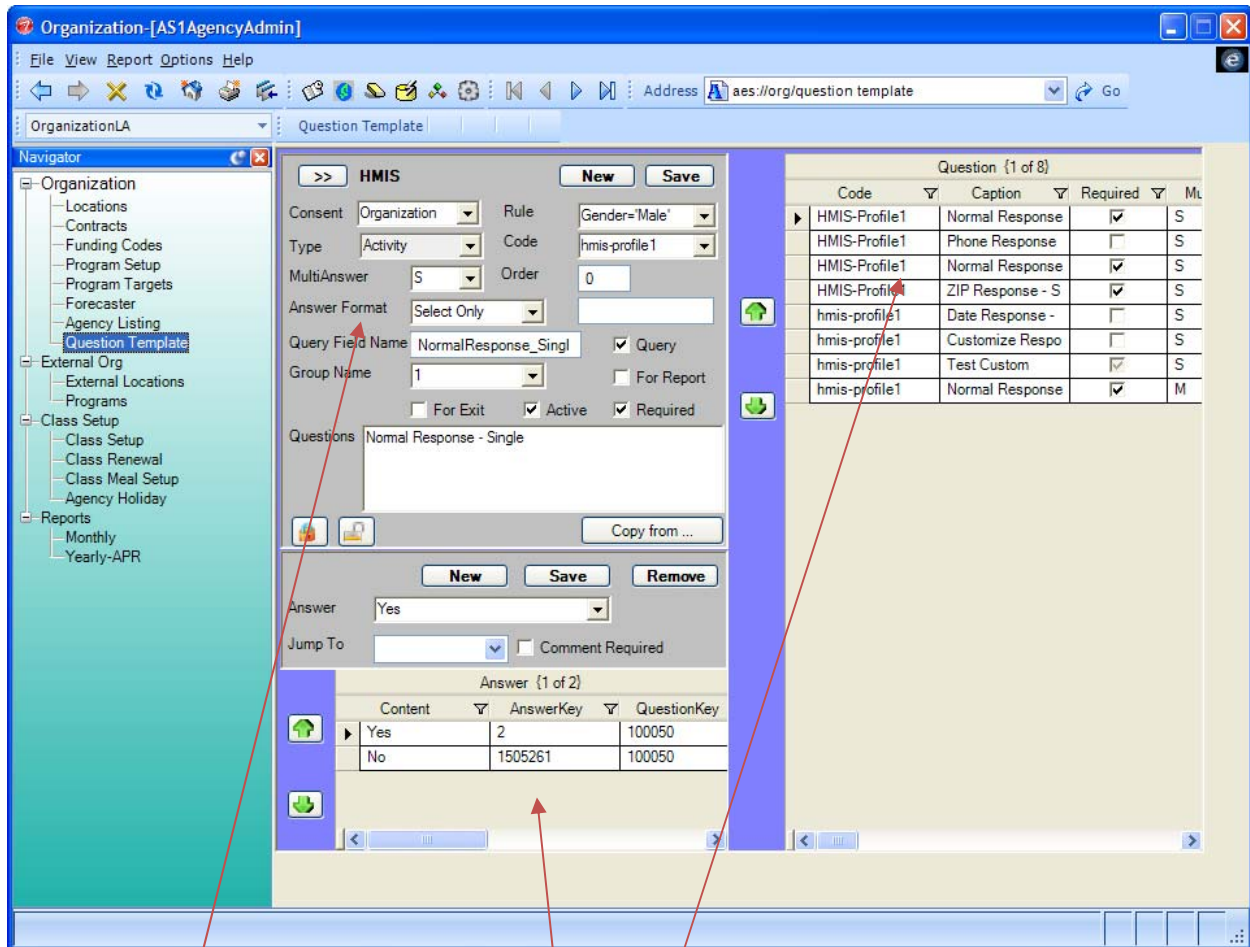
Renew Contract

- 1 Make sure correct Organization is showing in AGENCY GRID at top of page
- 2 Select Contract in CONTRACT GRID at bottom of page
- 3 Click RENEWAL button
- 4 Finish Renewal process on Contracts page

➤ *System Administrators will have access to all Organizations on this page; to view them all –*
1 Select View in the Menu Bar
2 If Security is checked, click it to remove checkmark
3 Click SEARCH button

Question Template Page


Create questions and answers that will be seen on the Entry, Exit or Profile pages in the application. Some questions sets have been preset, others need to have questions created by the Agency or System Administrator.




Navigating Question Template Page

- Selected set of Questions are displayed in QUESTION GRID
- Information about selected Question appears on left side of page
- Answers for selected question appear in ANSWER GRID at bottom of page
- Use UP and DOWN arrow button to change order of questions and answers

View existing Question set

- 1 Click >> button to select Module Type 
 - a Select Module Type in popup window
 - b Click SELECT button
- 2 Select Type
 - a Program, Funnel, Report, Activity
- 3 Select Code
- 4 Matching Questions will appear in QUESTION GRID on right side of page
- 5 Answers for selected Question will appear in ANSWER GRID at bottom of page

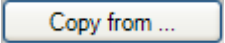
Create new Question Set

- 1 Click >> button to select Organization Type 
 - a Select Type in popup window
 - b Click SELECT button
- 2 Select Type of Question Set
 - a Program = question set will be used on Program Entry or Exit page
 - b Funnel not currently used
 - c Report = question set will be used for a Report and will appear on that page
 - d Activity = question set will be attached to an Activity and appear on Client Profile page
- 3 Select Code
 - a Codes that appear here were preset on the Program Setup page
 - b Program Codes are created in the Question Code field in the Program section; Activity Codes are created in the Question Code field for the specific Activity
- 4 Click NEW button at top of page
- 5 Select Consent level
 - a System = all Organizations will have access
 - b Organization = only User's Organization will have access
- 6 Select Rule
- 7 Select Multi-Answer
 - a S = single answer allowed for question
 - b M = multiple or more than one answer is allowed
- 8 Enter Order
 - a This is the order the questions will appear for the User
- 9 Select the Answer Format
 - a Select Only – means they cannot write in an answer
 - b Normal
 - c Phone
 - d Zip
 - e Date
 - f Social Security Number
 - g Customize (see *Create Custom Format for Answer*)
 - h Answer section has a place to allow an override of the format (see Answer section)
- 10 Enter Input Mask in blank field if using Customize answer format, otherwise leave blank
- 11 Enter Query Field Name
 - a When creating reports to query the answers to these questions, this will be the database table column name
 - b The table will be created for each Question Code when the Create Query Table button is used
- 12 If answer will be used in Reports, click to create checkmark in QUERY box
- 13 Select Group Name
 - a This is used only for Central Intake Profile/Assessment page questions
 - b These Group Names will be the Filter choices on that page
- 14 If question will be used on Exit page, click to create checkmark in For EXIT checkbox
- 15 If question is current and will be used, click to create checkmark in ACTIVE checkbox

16 If question is required, click to create checkmark in REQUIRED checkbox

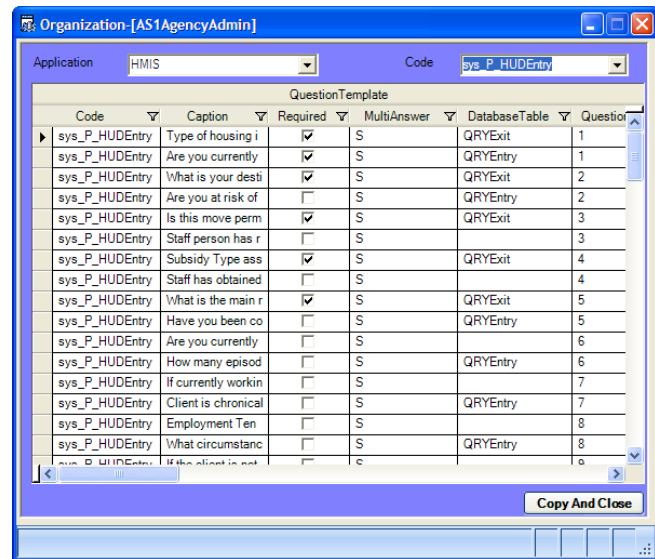
17 Enter text of the question

18 If Question is the same as one existing in an existing set of questions:

- Click COPY FROM ... 
- In popup window that appears, select Application in dropdown
- Select Question Code in dropdown
- Matching questions will appear in QUESTION TEMPLATE GRID
- Select Question to use
- Click COPY AND CLOSE button

19 Click SAVE at top of page

20 Repeat process #4-19 for additional questions for this question set



Create Answers

- Select the Question to answer in QUESTION GRID
 - Click NEW button in bottom section of page
 - Enter answer for this question
 - Click to create a checkmark in the NORMAL checkbox if an answer will be permitted to override the answer format and allow no masking on the answer
 - For example, if the answers were zip codes, xxxxx-xxxx, but an answer might say N/A, check the box
 - If the answer to this question should cause a Jump to a future question instead of the next one in the list, select that question in the Jump To dropdown
 - It helps to enter all questions first so there will be a question to select here as the Jump To target
 - Click to create a checkmark in the Comment Required checkbox if a comment will be required for this Answer
 - Click SAVE button in the bottom section
 - Repeat for additional answers for this question
- Use the UP and DOWN arrows to change Answer order.
- Repeat entire process for next question

Create Custom format for Answer

Build custom formats for specific answer types, i.e. contract names, ID, time, etc., using Input Masks. The Input Mask will consist of characters to represent what the User should enter for their answer.

<u>Input Mask</u>	<u>Sample Value</u>
&&-&&&	aa-ABC or #1-A
A-9999	A-1234 or b-99
00:00 <Am	11:11 am or 09:15 pm
#999	-20 or 1234

<u>Character</u>	<u>Description</u>
0	Digit 0 – 9; entry required; + and – not allowed
9	Digit or space; entry not required; + and – not allowed
#	Digit or space; entry not required; + and –allowed; blanks removed when data is saved
?	Letter A – Z; entry optional
A	Letter or Digit; entry required
a	Letter or Digit; entry optional
&	Any character or space; entry optional
C	Any character or space; entry optional (allowable literal characters in mask)
.,:;- /	Decimal placeholder, thousand, date, time separators
<	Causes all characters to be converted to lower case
>>	Causes all characters to be converted to upper case

View existing Organizations

- 1 Enter Agency Name and/or select Type at top of page
 - a Leave blank to search for all Agencies
- 2 Click SEARCH
- 3 All matching organizations will appear in the EXTERNAL AGENCIES GRID

➤ *Locations and Contacts entered here will be linked to Programs on the next page; they will then be available as choices on the Referral pages and will appear on Referral reports given to Clients*

Create new Organizations

- 1 Click NEW button at top of page
- 2 Select Consent
 - a This determines who will have access to this Organization as a Select Consent
- 3 Enter ORG Name
- 4 Enter Service Radius
- 5 Select Type of organization
- 6 Enter Web Site
- 7 Click SAVE

Create Organization Location

- 1 Click NEW button in middle section of page
- 2 Select Consent
- 3 Enter Location Name
- 4 Select Type of Location
- 5 Enter Address, City, State, Zip
- 6 Click SAVE
 - a Use DELETE to remove unwanted Location
- 7 Repeat for additional Locations

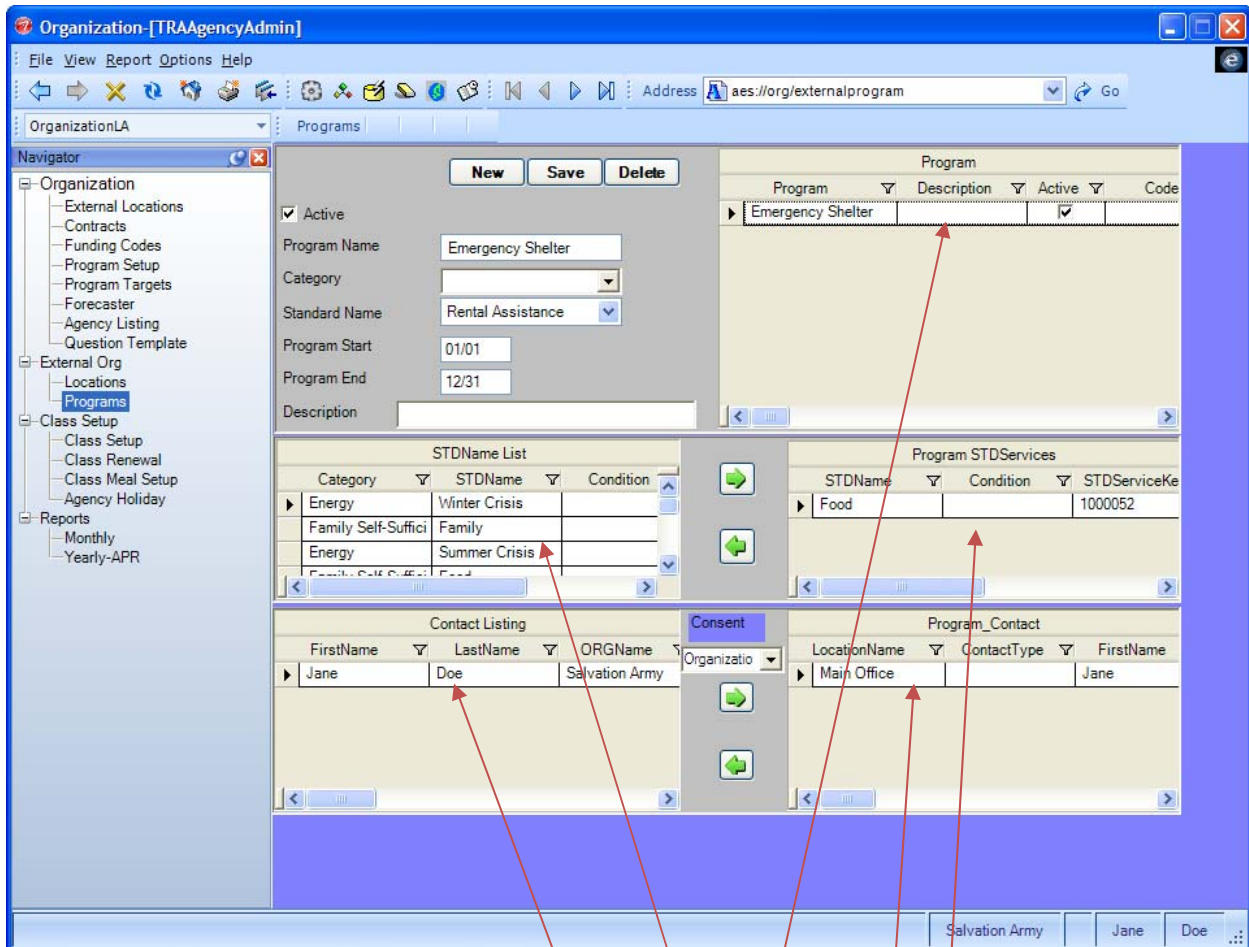
➤ *At least one Location and Contact must be created in order for the Program to appear as a choice on the Locations popup screen on the Referral page*

Create Location Contacts

- 1 Make sure correct Location is selected in LOCATION Grid
- 2 Click NEW button in bottom section of page
- 3 Enter Contact type
- 4 Select Title
- 5 Enter First and Last Name
- 6 Enter phone and email information
- 7 Click SAVE button
 - a Use DELETE to remove unwanted Contact
- 8 Repeat for additional Contacts

External Org - Programs Page

The External Programs pages are used to create external Programs to use as Referral Sources. An Organization can contain one or more Programs. The last Organization selected on the Locations page will be active when opening this page.



Navigating the External Org - Programs Page

- Active Organization will appear in Status Bar
- All available Programs of the active Organization appear in the PROGRAM GRID
- All STD Names/Conditions set up for the Agency appear in the STD NAME LIST GRID
- STD Names/Conditions linked to this Program appear in Program STD SERVICES GRID
- All Locations for the active Organization appear in the CONTACT LISTING GRID
- Locations & Contacts linked to this Program appear in PROGRAM CONTACT GRID

View existing Programs

- 1 Make sure correct Organization is selected
 - a Use blue toolbar arrows to scroll through available Organizations
 - b Organization name will be shown in Status Bar at bottom
- 2 All available Programs will appear in the PROGRAM GRID

➤ Programs entered here will be available as the choices on the Referral pages and will appear on Referral reports given to Clients


➤ Referral Activities in the Activity dropdown on the Referral page will automatically be named the same as the Referral Program

Create new Program

- 1 Click NEW button at top of page
- 2 Enter Program Name
- 3 Select Category
- 4 Select Standard Name
- 5 Enter Program Start and End Dates
- 6 Enter Description
- 7 Click to create checkmark in Active checkbox
- 8 Click SAVE


Setup Program Conditions

In the second section, the STD NAMES LIST GRID shows items that were set up on the Ref Conditions Setup page, and are tied to Standard Services and AIRS Taxonomy

- 1 Select all conditions that apply to this Program in the STD NAMES LIST GRID on the left side
- 2 Click the right arrow button to apply the condition to this Program
 - a STD Name will appear in PROGRAM STD SERVICES GRID on right side of third section 
 - b To remove a referral link, click the LEFT ARROW button

Link Location and Contact to the Program

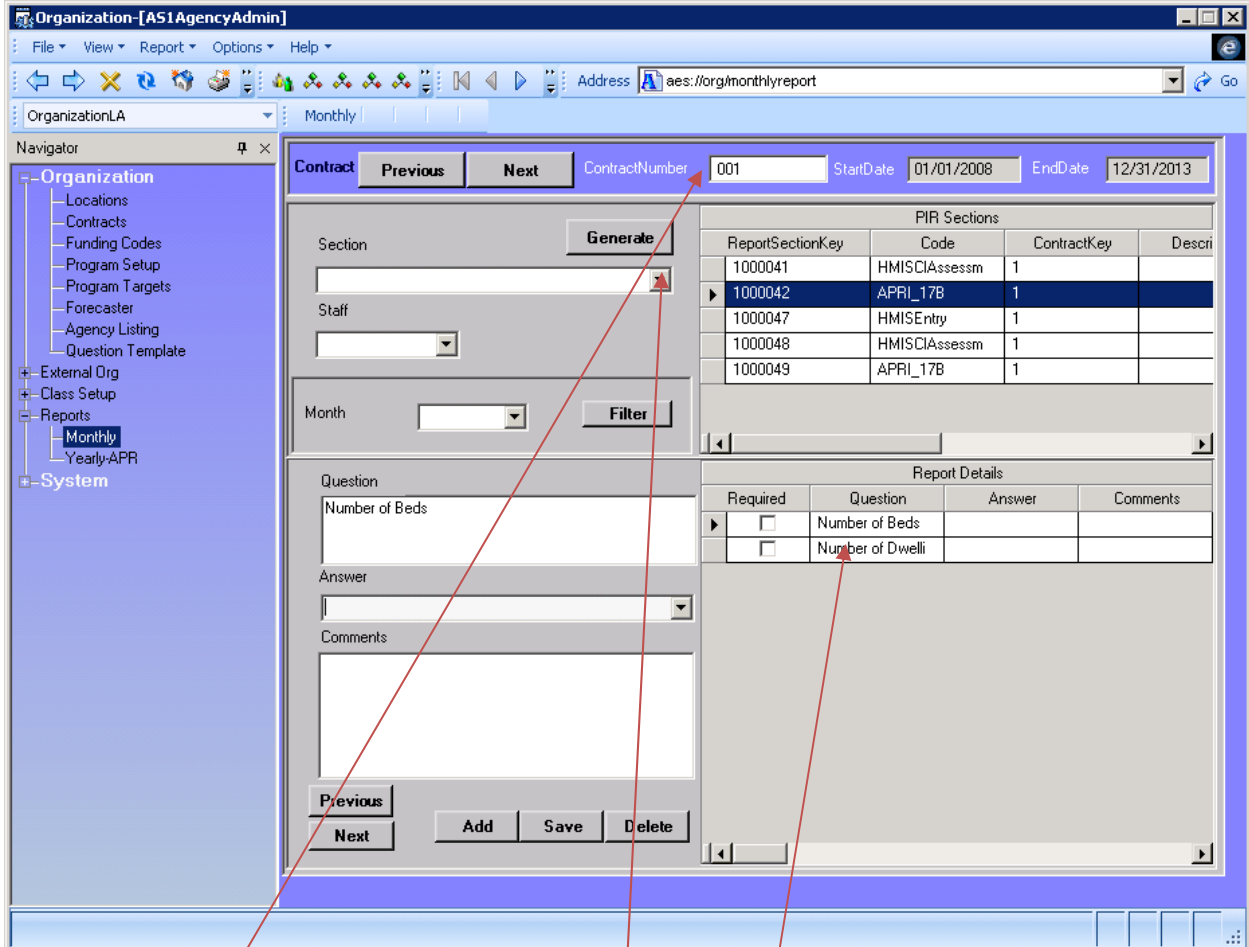
In the third section, the CONTACT LISTING GRID shows all the Contacts that were created for this Agency on the Locations page.

- 1 Select the appropriate Contact(s) for this Program
 - a These are the Contact(s) who will show up on the Referral Page as the person(s) to refer Clients to
- 2 Select the appropriate level of consent for this Contact
 - a This will determine who can refer Clients to this Contact 
- 3 Click the RIGHT ARROW button
 - a The Contact will appear in the PROGRAM CONTACTS GRID on the right side
 - b Use the LEFT ARROW button to remove a Contact

➤ The Consent Level determines who will see this Program/ Location/ Contact as a choice for Referrals:
- System = entire Collaborative
- Region = only Organizations in your Region
- Organization = only Users in your Agency

Report Pages

The Report pages are used to create the information for reports that is not generated directly from user data, such as the APR or PIR reports. Some pages may show a dropdown for Month or from Year. The Sections and Questions are created on pages in the System section.



Navigating the Reports Page

- Current Contract is shown in top section
- All available Sections of Report appear in the Section dropdown
- Questions of the selected Section appear in the REPORT DETAILS GRID

Select Contract

The active Contract appears in the top blue area. To select a different Contract:

- 1 Click NEXT button to go to next Contract
- 2 Click PREV button to go to last Contract

Generate Report Questions

- 1 Make sure correct Contract is selected in top blue area
- 2 Select Section in Section dropdown
 - a This determines which questions appear in REPORT DETAILS GRID below
- 3 Select Staff
- 4 Some Report pages will have a selection for month and/or year
- 5 Click GENERATE button
 - a Report appears in REPORT GRID at top of page and questions appear in REPORT DETAILS GRID below

Answer questions

- 1 Read Question in Question box
- 2 Select Answer in dropdown on left
 - a When a question allows multiple answers, the ADD button becomes available
 - b Click ADD for each additional answer needed
 - c Use DELETE to remove an unneeded answer
- 3 Click NEXT to go to next questions
- 4 Click PREVIOUS to return to last question
- 5 Enter Comments when needed
- 6 Click SAVE when finished

View Questions and Answers for a Section

- 1 Select Section in QUESTIONS GRID at the top of page
- 2 All Questions and Answers for that section will appear in bottom section

View all Questions and Answers for a specific Month or Year

- 1 Select Month or Year in dropdown on left side of page
- 2 Click FILTER button
- 3 Sections for that month or year will appear in REPORTS SECTIONS GRID at top of page
- 4 All Questions and Answers for that section will appear in bottom section

Annual Tasks

Some tasks will need to be completed each year, including renewing Contracts, creating new Milestones, and creating a new forecast. For more information about each task, see the corresponding page earlier in this Guide.


Annual Contract Renewal

Renew Contract

Start on the Agency Listing page:

- 1 Find Contract to renew in CONTRACTS GRID
- 2 Click RENEWAL button
- 3 Click on Contracts page link to open that page
- 4 Find Contract in top section
 - a Use blue arrows in toolbar to scroll through Contracts
 - b Contract that was active on Agency Listing page should be active here
- 5 New record will now be available in second section
- 6 Check Start and End Dates
- 7 Enter new Contract Number
- 8 Enter Contract Amount
- 9 Enter or select other Contract information
- 10 Click SAVE button in second section
- 11 Check the Target Area link in the third section to make sure the Target Links are still correct

If additional Target Areas need to be linked:

- 12 Click NEW in third section
- 13 Click the PERFORMANCE MEASURE button to open the popup window 
- 14 Select the Target Area
- 15 Click the SELECT button
- 16 Enter Title of Performance Measure
- 17 Enter Performance number
 - a This is the number of people the Agency is contracted to get to this Target Area
- 18 Click to create a checkmark in the IS NUMBER box if this number is a whole number rather than a percentage
- 19 Make sure ACTIVE box is checked
- 20 Click SAVE in third section
- 21 Repeat for additional Performance Measures
- 22 Check to make sure Contact information is still correct

If new Contacts need to be added:

- 23 Click NEW button in bottom section
- 24 Enter Contact information
- 25 Click SAVE button in bottom section
 - a Use DELETE to remove unneeded Contact

Update Funding Code Details

Funding codes will need to be updated only if using multiple Contracts in the Funding Code and percentages and/or dates have been assigned to each one:

- 1 Find Funding Code to update in FUNDING CODE GRID on left
- 2 Linked Contracts will appear in the Funding Code Contracts Grid at bottom left
- 3 Click DETAILS button
- 4 Click NEW button
- 5 Enter Start and End Dates of new Contract
- 6 Enter Percentage this Contract will contribute
- 7 Enter Comments
- 8 Click SAVE button
- 9 Use NEXT and PREVIOUS buttons at top to bring up other Contracts linked to this Funding Code
- 10 Repeat process for each Contract
- 11 Click CLOSE when finished

Annual Program Component and Milestone Renewal/Creation

Create new Program Components and Milestones


Program Components and their Milestones need to be recreated each year. Last year's Milestones may be copied or new ones can be created from scratch; if they are copied, they can still be edited. Program Components can be recreated one by one or for the entire Program at once.

Copy Milestones of ONE Program Component to new Milestone Year

- 1 Select Program in the Program dropdown at the top of page
- 2 Select Program Component in the dropdown
- 3 Select Year to Copy TO in dropdown below NEW and SAVE buttons
- 4 Click COPY TO button
 - a This creates the same set of Milestones for the new Milestone Year
 - b It uses the same Start and End Dates with the new year
 - c It also copies the link with any Target Areas that were created for the copied set of Milestones

See the Program Targets page for more information about editing any of the Milestones.

Copy Milestones of ALL Program Components of an entire Program to new Milestone Year

- 1 Select Program in the Program dropdown at the top of page
- 2 Click COPY MILESTONES FOR SELECTED PROGRAMS button in the top section 
- 3 Message will appear saying successful copy was completed
- 4 This copies the Milestones for ALL Program Components of the selected Program to the next Milestone Year
- 5 When NEXT button is clicked, Milestone Year will jump to next year, Start and End Date will indicate same dates with new year and Milestones will appear in MILESTONE GRID

See the Program Targets page for more information about editing any of the Milestones.

Create new Forecast

A new Forecast will need to be created for each Program Component.

Follow the instructions on the Forecaster page.