AES Agency & Program Setup Information

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Agency Creation			
Create Region: • Multiple Regions may be created • Region Name can be used only once	SECURITY WIZARD • **ORGANIZATION PAGE**	• Organizations cannot be created until Regions are created	
Create Organization: • Each Organization need unique 3-digit ORG Code	SECURITY WIZARD • **ORGANIZATION PAGE**	• Roles cannot be assigned and Programs created until Organizations are created • Web Tool is not available for Organization use until created here	• Organizations cannot be created until Regions are created
Assign Roles: • Each Organization will automatically have all LA and SA roles • Any additional roles need to be assigned to Org before they can be assigned to Users	SECURITY WIZARD • **ORGANIZATION ROLES PAGE**	• Users cannot be assigned Roles until they are assigned to Organization	• Roles need to be created first • Organization must be created first
Create Administrator: • Each Organization will automatically have AgencyAdmin login • Any additional Administrators need to be created, Sec Mgr permission will automatically be granted • Sec Mgr permission needs to be assigned to any other logins serving as Administrators	SECURITY WIZARD • **USER ADMIN PAGE**	• Administrators will not have access to Organization in Sec Mgr unless permission is assigned here • Organization must be created first	• Organization must be created first
Program Creation and Setup			
Head Start requirement			
Required only if using **Referrals**			
Web Tool creates			
If Using Program Development Web Tool, these items will be set up there			
Program Areas and Programs: • Can be set up in Web Tool or Security Manager • Each Program must be linked to one Program Area (TAG)	SECURITY MANAGER • **PROGRAM AREA PAGE & PROGRAMS PAGE**	• Programs must be set up here or in Web Tool for anything else to be set up	• Agency must be created in Security Wizard to be available in Web Tool and/or Security Manager
User Groups: • A User Group should be created for each GROUP of Programs/Reports needed	SECURITY MANAGER • **USER GROUP PAGE**	• Which Programs a User Group can access	

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Permissions: • Permission needs to be granted from the Program to the User Group	SECURITY MANAGER • **PERMISSION PAGE**	• Which Groups can access which Programs	USER OR PROGRAM GROUPS PAGE - • User Groups or Program Groups need to be set up first so the permissions can be granted here
Users: • Set up each User with a User ID and password	SECURITY MANAGER • **USER PAGE**	USER PERMISSION PAGE - • Permission cannot be granted until Users are created • If email is entered correctly, some sections will send email notification	
User Permissions: • Set up in Security Manager	SECURITY MANAGER • **USER PERMISSION PAGE**	• User's ability to log in to system	USER PAGE - • User must be created first USER OR PROGRAM GROUPS PAGE - • User Groups or Program Groups so the permissions can be granted
Report Permission: • Permission needs to be set up for each Report and each User Group using it	SECURITY MANAGER • **REPORT PERMISSION PAGE**	• User's ability to access reports	• Reports need to be published first • Reports need to be added and assigned in Security Wizard
Locations and Contacts: • All internal Locations where service is delivered • Consent for each Location (Organization) • Type for each Location • Address information for each location • Contact(s) at each location (multiple ok, but need at least one) • Inspection Details where needed • GEO code (HMIS only)	ORGANIZATION SECTION • **LOCATIONS PAGE**	PROGRAM SET UP PAGE - • Details popup and Locations popup will show only these locations and contacts (this affects referrals and activities) REFERRAL PAGE - • Service Location popup will show locations for eligible programs BED INVENTORY PAGE - • Locations will appear in dropdown SEC WIZ & SEC MGR: USER PAGES - • Locations will appear in dropdown for Users only after created here	WEB TOOL - • Locations are created here for classes in Head Start and Shelters for HMIS
Contracts: • All contracts and details • Current year information (Contract Number, dates, $) • Active is checked • Funding Area, Funding Source, Grantee and Sponsor needed for APR	ORGANIZATION SECTION • **CONTRACT PAGE** ▪ ***TOP TWO SECTIONS***	FUNDING CODE PAGE - • Contracts will show up here once active	AGENCY LISTING PAGE - • New Details section will be available after Contract is renewed on Agency Listing page and REFRESH is clicked

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Performance Measures: • Each Contract can have Performance Measures/ Target(s) linked • Performance number contracted for	ORGANIZATION SECTION • **CONTRACT PAGE**	PROGRAM TARGETS PAGE - • Performance Measures will appear here only if they have been linked with contract first	INVESTOR TARGET & TARGET AREA PAGES - • Targets and Performance Measures must be created
Contract Contacts: • Agency contact who is responsible for the contract • Contact Type = Grantee and = Sponsor information for APR	ORGANIZATION SECTION • **CONTRACT PAGE**	AGENCY PROFILE REPORT - • Used by agencies to review all contract details APR REPORT - • Uses names of those designated as Grantee official and Sponsor official	
Funding Codes: • Funding Code must be created for each Contract and for each combination of Contracts that fund activities • Activity Flag checked • Link with Contract(s)	ORGANIZATION SECTION • **FUNDING CODE PAGE** ▪ ***FUNDING CODE SECTION***	PROGRAM SETUP PAGE - • Activities cannot be saved until a Funding Code is available	WEB TOOL - • Funding Codes are created here CONTRACT PAGE - • Funding Codes can't be linked until Contracts exist
Funding Sources: • All Funding Sources paying for Head Start must be created here, with Type, Start Date and Units filled out • Activity box is NOT checked	ORGANIZATION SECTION • **FUNDING CODE PAGE** ▪ ***FUNDING SOURCE SECTION***	PREFERENCE/FUNDING PAGE - • Funding Sources show up in Funding Status Grid	WEB TOOL - Funding Sources are created here
Program Setup: • Programs will appear here once set up in either Web Tool or Security Manager • Question Code & Standard Name need to be entered for each Program	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM SECTION***	ENTRY & EXIT PAGE - • Questions attached to code appear on page QUESTION TEMPLATE PAGE - • Questions Codes will appear here as choices only if created for Program first	WEB TOOL - • Question Codes and Standard Names are created when creating Program

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Program Details popup top section: • Auto Create Mode determines WHO is enrolled in Program • Focus Code • Start and End date • Project Name ties to APR report • Poverty Level needed by some Programs • Target Population name can tie to Rule	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM DETAILS POPUP WINDOW- TOP SECTION***	DEMOGRAPHIC REPORT - • Focus Code determine who shows up on report (I/F/H) PROGRAM ENTRY - • Auto Create Mode controls who (I/F/H) is entered into Program INCOME SNAPSHOT AT PROGRAM ENTRY - • Focus Code determines what shows up in income snapshot (I/F/H) MANY PAGES - • Start and End date determine Operation Year	WEB TOOL - • Focus Code and Start/End dates are created here
Program Details popup 2nd section: • Closeout Date • Closeout Mode: Exit or OnGoing	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM DETAILS POPUP WINDOW- 2ND SECTION***	• If and how Clients proceed to the next Operation year • How Program Exit is handled • How Application and Milestones are created for new year	
Program Details popup 3rd section: • STD Name links	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM DETAILS POPUP WINDOW- 3RD SECTION***	REFERRAL PAGE - • Links created here will be the potential Referral Sources on Referral pages	STDNAME SETUP PAGE - • Conditions set up here will be choices in STD Name List Grid
Program Details popup 4rth section: • Contact links • Consent Level	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM DETAILS POPUP WINDOW- 4TH SECTION***	REFERRAL PAGE - • These Contacts appear as Contacts for Referrals • Consent Level determines who can see this referral source	LOCATION PAGE - • Contacts must be created here to show up
Program Locations popup window: • Locations are linked to each Program	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***SET PROGRAM LOCATION BUTTON***	HEAD START & HMIS SETUP - • Locations linked to Program appear as choices (including Head Start Class setup and HMIS shelter locations)	LOCATION PAGE - • Locations must be created here to show up

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
HUD Parameters popup window: • Only HMIS programs • Program Type Code • Program Site Configuration Type • Tracking Method • Target Population A and B • Direct Services Code	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***SET HUD PARAMETERS BUTTON***	REPORTS - • Certain HUD reports need these parameters BED INVENTORY - • Beds for Locations of this Program will have this Target Population and Program Type Code	
Program Component: • All Program Components • Connected to correct Program • Checked as Active • Correct Standard Name if used • If it should be generated automatically, check Auto Create checkbox	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***PROGRAM COMPONENT SECTION***	SERVICES PAGE - • These Program Components appear in dropdown after Client is entered in Program PROGRAM ENTRY FOR CLIENTS - • Program Components checked as Auto Create will automatically appear for each Client entered into Program	WEB TOOL - • Program Components are created here

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Activities: • All Activities • Connected to correct Program Component • Correct ACTIVITY TYPE is selected • Correct STANDARD NAME is selected • FUNDING CODE is selected • QUESTION CODE required for all Profile Activities • Checked as Active • Unit Type selected – Min, Unit, Cost, etc. • Default number of Units if needed • Default Unit Cost if needed • MAX used only for Head Start • Billing = YES if using Billing Module • Estimated Time if using Resource Manager scheduling • Auto Create box checked for Activities that will be created automatically with Program Component • "Complete" entered in Complete field if using automatic Milestone status update • Category selected if using NPI 6.2 counting • Swipe box checked, Daily Limit and Client Daily Limit entered if using swipe cards • Referral popup used for any Activity that will also be a referral choice • RSM box checked if the activity should be scheduled as an appointment • Scan box checked if the activity will be included on Activity Smart Forms • Kit/Bed box checked if activity will count as Bed activity	ORGANIZATION SECTION • **PROGRAM SETUP PAGE** ▪ ***ACTIVITY SECTION***	ACTIVITY PAGES - • Activity Type determines which page Activity appears on • Question Code determines which questions appear on Profile pages • Unit Type determines what Units are measured; COST will cause Cost and Date To: fields • "Complete" will cause checkmark to appear in checkbox and Milestone Status to change to Complete REPORTS - • Funding Code determines which Contracts pay for Activity PROGRAM ENTRY FOR CLIENTS - • Activities set as Auto Create will automatically appear for Clients entered into Program Component REFERRAL - • Activities set up on referral popup will appear as choices in the Activity dropdown on Referral page QUESTION TEMPLATE PAGE - • Questions Codes will appear here as choices only if created for Activity first	WEB TOOL - • Activities are created here • Activity Type, Standard Name, Funding Code, Question Code & Focus Code all may be selected here FUNDING CODE PAGE - • Funding Code must be created in order to be linked to Activities here

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Milestone Setup: • Current Dates for each Program Component • Milestone(s) for each Program Component • Milestone Description and Verification • All Milestones checked as In Service	ORGANIZATION SECTION • **PROGRAM TARGET PAGE**	SERVICES PAGE - • Milestones and their verifications will appear in this order INDIVIDUAL AND GROUP SERVICES PAGES - • Milestones will appear in dropdowns when Program Component is selected FORECASTER PAGE - • Milestones will appear in this order	WEB TOOL - • Milestones are created here PROGRAM SET UP PAGE - • Program Components need to be created first
Milestone & Performance Measure Link: • Some Milestones will be linked to a PM	ORGANIZATION SECTION • **PROGRAM TARGET PAGE**	REPORTS - • Credit for Performance Measures (NPI) will only occur if this link is made	CONTRACT PAGE - • Performance Measures linked to Contract here will be displayed
Milestone Forecasts: (not required) • Projections and Forecast set up for current contract year • Total New number is used for some reports	ORGANIZATION SECTION • **FORECASTER PAGE**	SERVICES Page - • Shows # of days for each Milestone in grid SOME REPORTS - • Total New number used on some reports	PROGRAMS TARGET PAGE - • Milestones must be set up here and be in correct order • When planning new year, Milestones for that year must be created and ready
Other System Setup			
Investor Goals: • Each Result Area & Goal	SYSTEM SECTION • **INVESTOR GOALS PAGE**	PERFORMANCE MEASURE PAGE - • Investor Goals needs to be created before Performance Measures can be used	WEB TOOL - • Investor Goal and Categories created in Web Tool
Performance Measures: • Each Performance Measure and related information	SYSTEM SECTION • **PERFORMANCE MEASURE PAGE**	CONTRACTS PAGE - • Performance Measures need to be set up to be linked to a Contract (and then to a Milestone)	WEB TOOL - • Performance Measures created in Web Tool INVESTOR TARGETS PAGE - • Investor Targets must be set up here first
Questions and Codes: • Each Program needs the correct Questions and Codes for entry questions and assessments • Assessments to appear on the Profile/ Additional Questions page need questions built and code created • Group needs to have the same name for each Question of Group if used	SYSTEM SECTION • **QUESTION TEMPLATE PAGE**	PROGRAM ENTRY & EXIT PAGE - • Questions will appear only if correct code is entered or selected on the Program Setup Page ADDITIONAL QUESTIONS PAGE - • Assessments will appear after activity and questions created	PROGRAM SETUP PAGE - • Question code must be set up first to be chosen here (for Activity or Program) WEB TOOL - • Question codes are created with Programs and Activities

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Dropdowns: • Additional choices can be set up for many dropdowns	SYSTEM CONFIGURATION SECTION • **DROPDOWN PAGE**	MANY PAGES	• Helpful to know actual name of page; Name on Tree View column shows Page names in current application; look at page name in URL address field at top of screen
Address Cities, Counties and State: • Once a Client Address is marked VALID on this page, the City, County and State will be available in future Client entry dropdowns	SYSTEM CONFIGURATION SECTION • **CHANGE ADDRESS PAGE**	CLIENT INTAKE PAGE - • Users will be able to select Cities, Counties and States instead of typing entire word • Will reduce misspellings	
External Agency: • Potential external referral agencies set up here • Each needs at least one Location • Each Location needs at least one Contact • Contact needs Email if using automatic email notification	EXTERNAL AGENCY SECTION • **EXTERNAL AGENCY PAGE**	EXTERNAL PROGRAMS PAGE - • Only Agencies set up and active will appear here	
External Program: • All potential external referral programs set up here • Program Name is what will appear in Activity dropdown for User	EXTERNAL AGENCY SECTION • **EXTERNAL PROGRAM PAGE**	REFERRAL PAGE - • Only Programs set up and active will appear as External referral sources	REF CONDITIONS SETUP PAGE - • Referral Conditions must be set up first to be chosen here
Referral Conditions: • Set up Categories • Set up STD Names (sub categories)	SYSTEM CONFIGURATION SECTION • **STD NAME PAGE**	PROGRAM SETUP PAGE DETAILS POPUP WINDOW & EXTERNAL PROGRAM PAGE - • These Categories will appear in the grid to link to Programs REFERRAL PAGE - • Categories that are linked to a Program will appear as choices for User • Programs that are linked to a Category will appear in Services Location popup	
Status Window Dropdown Selections: • What will appear as selections in the Status dropdown needs to be set up here and linked to the proper page	SYSTEM CONFIGURATION SECTION • **STD STATUS PAGE**	Status Window Dropdown Selections - What will appear as selections in the Status dropdown needs to be set up here and linked to the proper page	
Rules:	SYSTEM CONFIGURATION SECTION • **RULES PAGE**	MANY PAGES	

What to Set up	AES Library & Page	What this Item Affects	What Affects this Item
Poverty Levels: • Needs to be set up once per year	SYSTEM CONFIGURATION SECTION • **POVERTY LEVEL PAGE**	MANY PAGES	
Report: • Some Reports will be created on this page as needed	ORGANIZATION SECTION • **REPORTS PAGE**	APR, PIR, CSBG REPORTS - • Reports will be created with data input on this page	REPORT SECTION PAGE - • Report Sections need to be created here in order to appear on Report page
Report Sections: • Report Types, Section names • APR, CSBG, PIR codes	SYSTEM CONFIGURATION SECTION • **REPORTS SECTION PAGE**	REPORTS PAGE - • Questions will be available here once set up	
Start Page: • Add photos, logos, new information	SYSTEM CONFIGURATION SECTION • **START PAGE SETUP PAGE**	• What users see when they first log into the system is determined here	
Edit Script Address Page: • Create or edit the URL address for the Profile script	SYSTEM CONFIGURATION • **EDIT SCRIPT ADDRESS PAGE**	PROFILE PAGE - • Assessment will be available once address is set up here	• Questions and script for Assessment must be created first
Teacher/Home Visitor Information: • Name, position, other related information	HR PAGES • **STAFF INFORMATION PAGE**	CLASS SETUP PAGE - • Instructor appears in dropdown CLASS ATTENDANCE PAGES - • Staff appears in dropdowns on Attendance page	• Users set up in Security Manager will appear here in Staff dropdown
Head Start requirement			
Required only if using **Referrals**			
Web Tool creates			
More detailed information about each of these items is found in: • Program Development Web Tool Guide • System Setup Guide • Security Wizard Guide • Security Manager Guide • Organization Setup Guide			