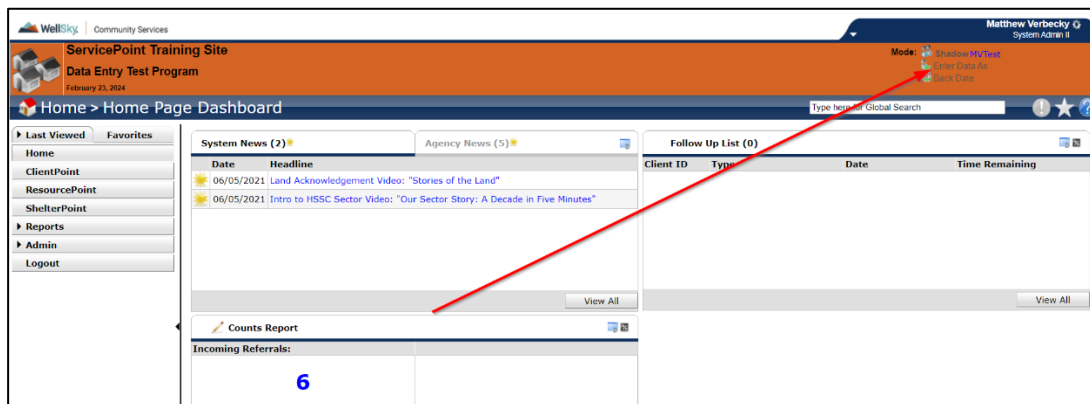


Distress Centre – Coordinated Entry HMIS Training Manual

| | |
|--|---|
| Distress Centre – Coordinated Entry HMIS Training Manual | 1 |
| ClientPoint | 1 |
| Summary Tab | 2 |
| Client Profile Tab | 5 |
| Case Plans Tab..... | 5 |
| Assessment Tab..... | 8 |

ClientPoint

1. Ensure you are 'Entering Data As' **Distress Centre – Coordinated Entry** before you continue with any data entry. To do this, navigate to the top right of your screen in ServicePoint and select the 'Enter Data As' button.



2. Once you click on the 'Enter Data As' button, ensure you select Distress Centre – Coordinated Entry. Once selected, you will now be ready to enter data.
3. From the menu, select ClientPoint.

The screenshot shows a vertical menu with the following items: Last Viewed, Favorites, Home, ClientPoint (highlighted with a red box), ResourcePoint, ShelterPoint, Reports, Admin, and Logout.

4. Establish if Client Record already exists in HMIS by 'less is more' search.
 - a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist. If record exists, click on hyperlink to open Client Profile.)

The screenshot shows the 'Client Search' form. The 'First' field contains 'De' and the 'Last' field contains 'We'. Both fields are highlighted with red boxes. The form also includes fields for Middle and Suffix, an 'Exact Match' checkbox, and buttons for Search, Clear, Add New Client With This Information, and Add Anonymous Client. A message at the top right says 'Please Search the System before adding a New Client.'

5. IF NEW CLIENT:
 - a. Type full name correctly in First & Last Name search fields (do not enter data in other search fields)
 - b. Press 'Add New Client with This Information'

The screenshot shows the 'Client Search' form. The 'First' field contains 'Dean' and the 'Last' field contains 'Ween'. Both fields are highlighted with red boxes. The 'Add New Client With This Information' button is also highlighted with a red box. The form includes the same fields and buttons as the previous screenshot.

- c. A warning window will pop up reminding you to check the system for duplicate client profiles.
 - d. Press 'OK' to continue.

The screenshot shows a dialog box titled 'Add New Client Information'. The text inside says: 'You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?'. There are 'Ok' and 'Cancel' buttons at the bottom, with the 'Ok' button highlighted by a red box.

Summary Tab

6. You will notice that you have access to an ROI window. Although you will not use this in your regular workflow, this window has been provided to you for any time you refer a client to Pathways Assertive

Outreach. Please see instructions on how to refer a client to Pathways Assertive Outreach at the end of this training document.

| Release of Information | | | |
|---|------------|------------|----------|
| Provider | Permission | Start Date | End Date |
| <div>Add ROI</div> <div>No matches.</div> | | | |

7. Under the Summary tab, ensure the Distress Centre – Coordinated Entry Client Profile is complete.

Only proceed with data entry after you are certain that the FOIP notification has been read and discussed with the individual.

| Distress Centre - Coordinated Entry Client Profile | |
|--|---|
| Distress Centre - Coordinated Entry Client Profile | |
| The FOIP notification has been read and discussed with the client (required) * | Yes G |
| What is your primary language? | French G |
| If "Other" language, please specify: | <input type="text"/> G |
| What is your ethnicity? | Latin American G |
| If "Other" ethnicity, please specify: | <input type="text"/> G |
| What are your preferred pronouns? | He/Him/His G |
| Citizenship Status | Permanent Resident G |
| If "Other" status, please specify: | <input type="text"/> G |
| What is your place of birth? | <input type="text"/> G |
| Current housing situation | Client Doesn't Know G |
| If "Other" housing situation, please specify: | <input type="text"/> G |
| How did you hear about SORCe? | Law Enforcement Referral G |
| If "Other" source, please specify: | <input type="text"/> G |

No data should be entered if the FOIP Notification is left unanswered or indicated as 'no'.

- a. Answer and/or validate all pertinent questions within the Distress Centre – Coordinated Entry Client Profile.
8. Answer and/or validate all pertinent questions within the SORCe Service Needs sub-assessment.

Edit Recordset - (4976) Ween, Dean

SORCe Service Needs

| | | | | | |
|---|-----------------------------|--|--|--|---|
| Start Date * | 02 / 22 / 2024 | | | | G |
| End Date | 02 / 22 / 2024 | | | | G |
| Primary Service Need | Financial | | | | G |
| Does client have an appointment? | No | | | | G |
| Which SORCe Agency are you referring the client to? | Distress Centre / Financial | | | | G |
| SORCe Service Delivery Method: | In person | | | | G |
| Intake Notes | | | | | |
| Did you refer to an agency outside of SORCe? | No | | | | G |
| If you referred to an agency outside of SORCe, which one(s)? | | | | | |
| Do you have a case manager that supports you? | Yes | | | | G |
| If yes, please specify the agency: | Alpha House | | | | G |
| Check-in category: | Self Check-In | | | | G |
| Service Transaction Notes | | | | | |
| If client was referred to SORCe from outside of the sector, please specify where they were referred from: | Alpha House | | | | G |
| Checked-In by: | -Select- | | | | G |

Print Recordset Save Save and Add Another Cancel

9. Answer and/or validate all pertinent questions within the SORCe Service Outcomes sub-assessment.

Edit Recordset - (4976) Ween, Dean


SORCe Service Outcomes

| | | | | | |
|--|-----------------------------|--|--|--|---|
| Start Date * | 02 / 22 / 2024 | | | | G |
| End Date | 02 / 22 / 2024 | | | | G |
| What was the service? | Financial | | | | G |
| Were services provided? | Yes | | | | G |
| Has the service been achieved? | Yes | | | | G |
| If no, is there any follow up needed? | | | | | |
| What program provided the service? | Distress Centre / Financial | | | | G |
| Who was the case worker that provided the service? | -Select- | | | | G |


Print Recordset Save Save and Add Another Cancel

Client Profile Tab

10. Within the client profile tab, you can edit the client record and client demographics windows. Answer and/or validate all pertinent questions within the two windows by clicking on the pencil icon in the top left corner of the windows.


Client Record

| | |
|-------|------------|
| Name | Ween, Dean |
| Alias | |
| Age | 44 |


Client Demographics

| | |
|-----------------------------------|-------------------|
| What is your date of birth? | 01/01/1980 |
| Date of Birth Type | Full DOB Reported |
| Reason Date of Birth not answered | |
| What is your gender? | Male |
| What is your ethnicity? | Latin American |

Case Plans Tab

11. To add a new case note folder, click the add goal button.

Add Goal

12. The screen will refresh and display the case plan – add a new goal screen. The elements that are emphasized in red boxes are mandatory fields, they must be answered if you wish to make a case note folder. Please reach out to the HMIS team for more information on all non-mandatory fields in the goal window.

Goal

Goal - (4976) Ween, Dean

Household Members

This Client is not a member of any Households.

Provider *

Distress Centre - Coordinated Entry (441)

Case Manager

-Select-

Date Goal was Set *

02 / 22 / 2024

Classification *

-Select-

Type *

-Select-

Goal Description

Target Date

/ /

Overall Status *

-Select-

If Closed, Outcome

-Select-

/ /

If Partially Complete, Percent Complete

-Select-

Projected Follow Up Date

/ /

Follow Up User

Distress Centre - Coordinated Entry (441)

-Select-

Follow Up Made

-Select-

Completed Follow Up Date

/ /

Outcome at Follow Up

-Select-

Add Goal

Cancel

13. Complete each field in the Goal Data section:

- Provider: The program you are entering data for will automatically populate in the provider box.
- Date Goal was Set: Today's data will automatically populate in the date field.
- Classification: Select SORCe

Classification *

SORCe

- Type: You will be able to choose from a range of types associated to the SORCe note classification

| |
|---------------------------------------|
| ID - Birth Certificate |
| CA - Basic Needs |
| CA - Financial |
| CA - Health |
| CA - Housing |
| CA - Justice |
| CA - Peer Support |
| HL - Eviction Prevention |
| HL - Rapid Diversion |
| HL - Rapid Re-Housing |
| HSD - Diversion Case Management |
| HSD - Eviction Prevention |
| HSD - Rapid Diversion |
| HSD - Rapid Re-Housing |
| ID - Alberta Health Card |
| ID - Birth Certificate |
| ID - Government ID |
| ID - Other |
| MH - Connection to Supports |
| MH - De-Escalation/Regulation |
| MH - Rapport Building / Goal Planning |

e. Overall Status: Select the option that best describes the progress toward the stated goal.

| | |
|---|-------------|
| Overall Status * | -Select- ▼ |
| If Closed, Outcome | -Select- |
| If Partially Complete, Percent Complete | Closed |
| | Identified |
| | In Progress |

14. Click Add Goal. The screen will refresh, and you will now see a Folder created for that goal.

Add Goal

| | | | | | | | |
|--|--|---------------|-------|---------------------------------|------------|------------|--|
| | | SORCe - SORCe | SORCe | HSD - Diversion Case Management | 08/22/2023 | 08/22/2023 | |
| | | SORCe - SORCe | SORCe | ID - Birth Certificate | 03/17/2023 | 03/17/2023 | |
| | | SORCe - SORCe | SORCe | ID - Birth Certificate | 03/17/2023 | 03/17/2023 | |
| | | SORCe - SORCe | SORCe | MH - Connection to Supports | 02/24/2021 | 02/24/2021 | |

Assessment Tab

15. Under the Assessments tab, you have access to two assessments: Client Contact Information and the Pathways Assertive Outreach Assessment

Select an Assessment

-Select-
Submit

Client Contact Information

Address

Email Address

Telephone Number 1

Program client code

Telephone Number 2

Preferred Method of Contact

Date of last client contact

Client contact notes

Allergies (please list)

Emergency Contact Information (for Client)

| Name | Relationship | Phone Number | Start Date of Emergency Contact* | End Date of Emergency Contact |
|--------------------------------------|--------------|--------------|----------------------------------|-------------------------------|
| Add | | | | |
| Are you pregnant? -Select- | | | | |
| If pregnant, estimated due date: / / | | | | |

Print Assessment
Save
Cancel

16. Please see this guide if you wish to complete a referral to Pathways Assertive Outreach.
- [How to Refer a Client to Pathways Assertive Outreach](#)