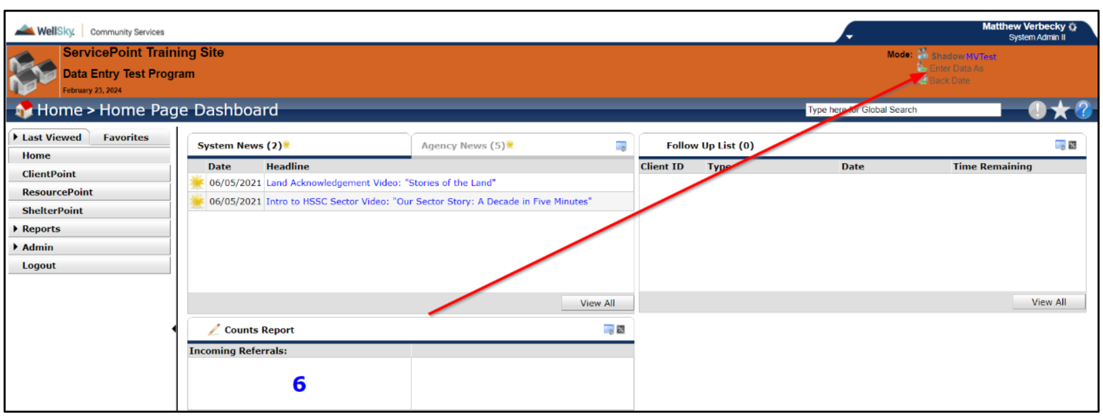
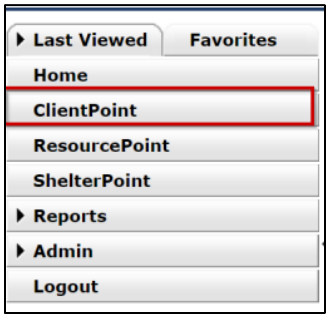
Distress Centre – Coordinated Entry HMIS Training Manual

ClientPoint

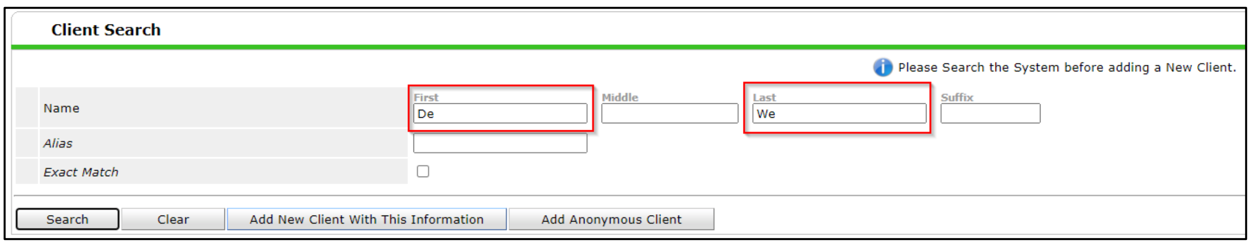
1. Ensure you are 'Entering Data As' **Distress Centre – Coordinated Entry** before you continue with any data entry. To do this, navigate to the top right of your screen in ServicePoint and select the 'Enter Data As' button.



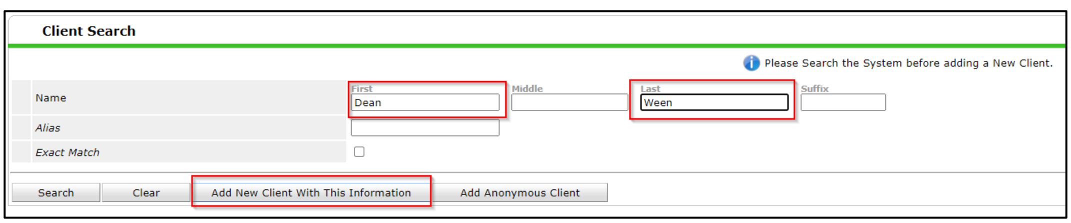
2. Once you click on the 'Enter Data As' button, ensure you select Distress Centre – Coordinated Entry. Once selected, you will now be ready to enter data.
3. From the menu, select ClientPoint.



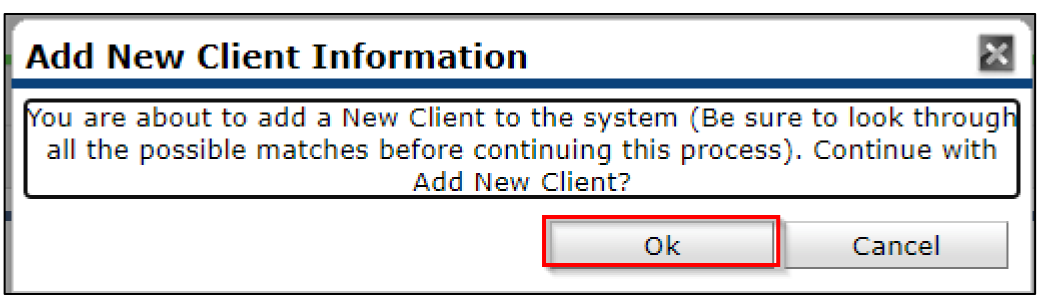
4. Establish if Client Record already exists in HMIS by 'less is more' search.
    a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist. If record exists, click on hyperlink to open Client Profile.)



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'



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



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
Add ROI	No matches.		

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

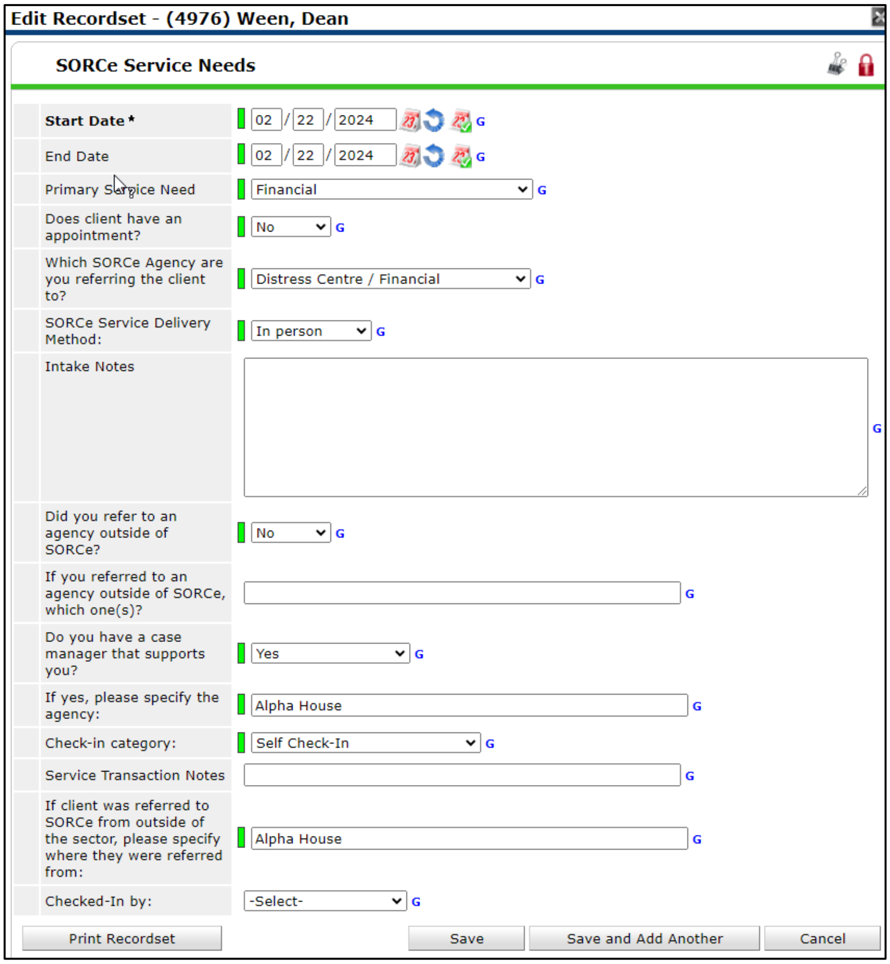
Distress Centre - Coordinated Entry Client Profile

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

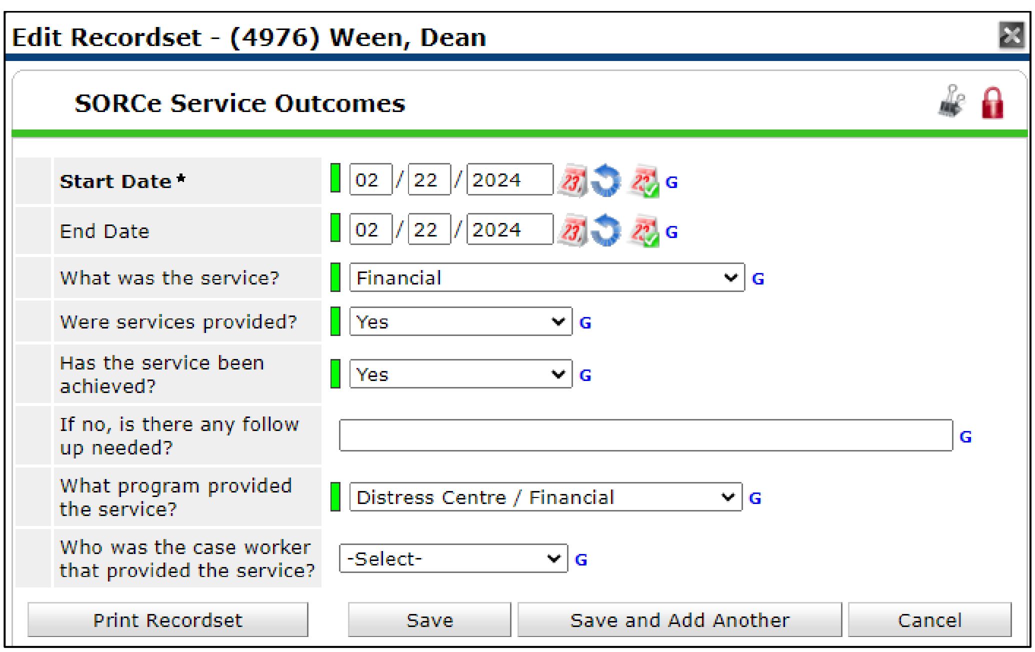
No data should be entered if the FOIP Notification is left unanswered or indicated as 'no".

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.

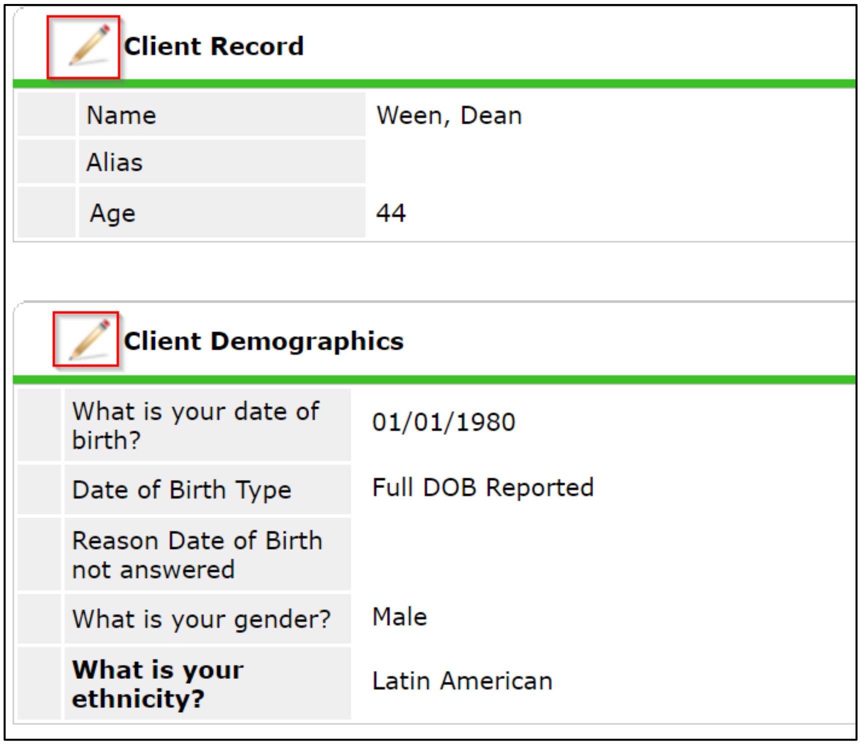


9. Answer and/or validate all pertinent questions within the SORCe Service Outcomes sub-assessment.



Client Profile Tab

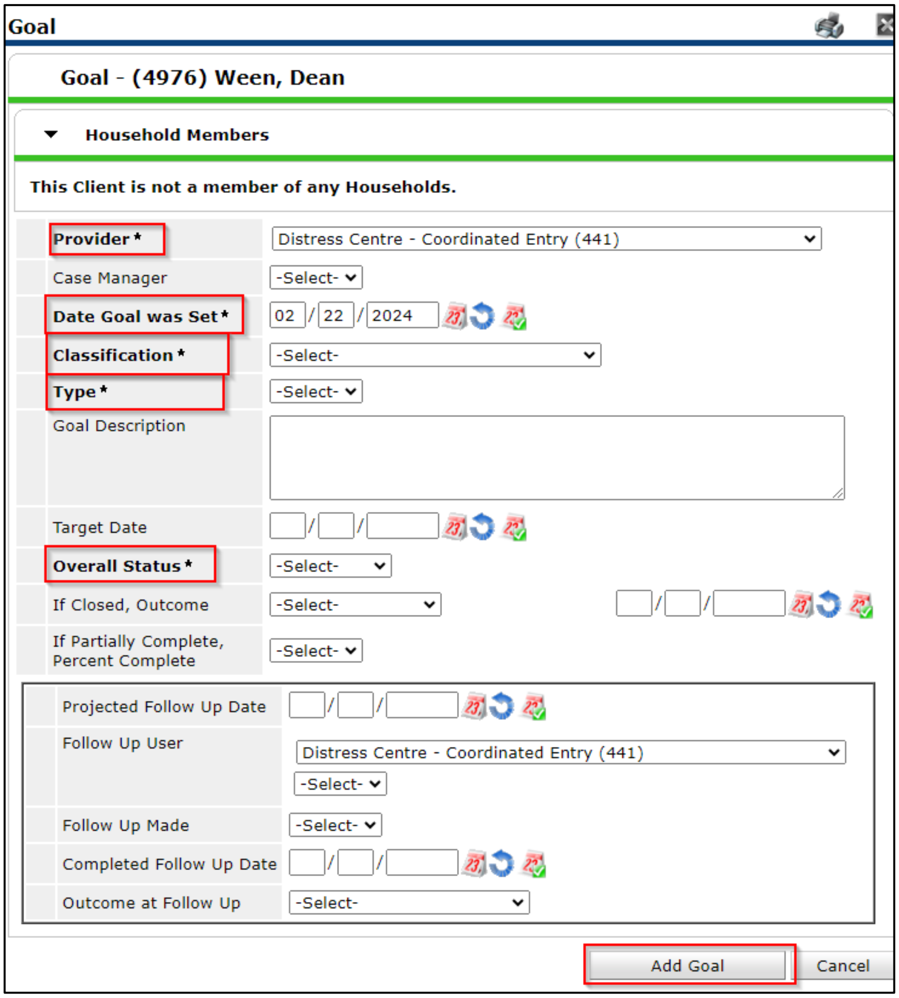
10. Within the client profile tab, you can edit the client record and client demographics windows. Answer and/or validate all pertinent questions within the two windows by clicking on the pencil icon in the top left corner of the windows.



Case Plans Tab

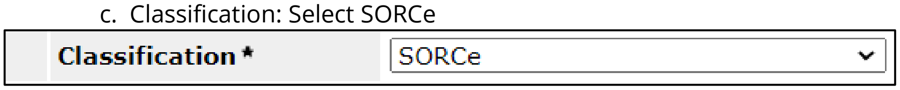
11. To add a new case note folder, click the add goal button.

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.



13. Complete each field in the Goal Data section:

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



    d. 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- Closed Identified In Progress
If Partially Complete, Percent Complete	

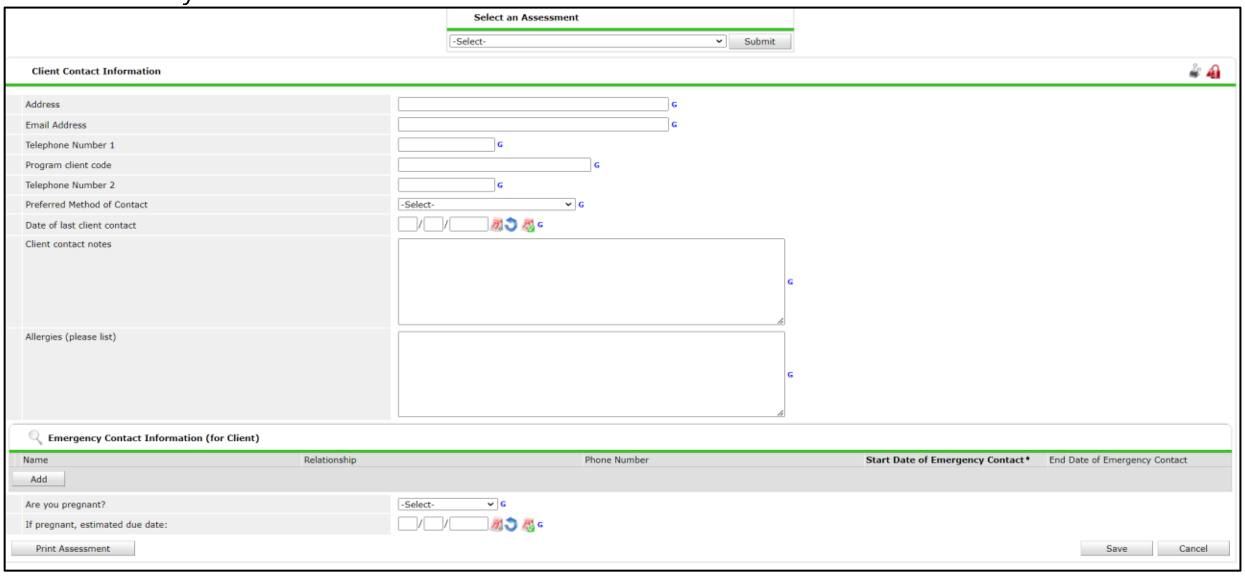
14. Click Add Goal. The screen will refresh, and you will now see a Folder created for that goal.

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



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