

211 Calls Workflow CS 5.15

Pre-Requisites

Users will need working knowledge of the [Standard Operating Procedures](#), how to navigate the Homeless Management Information System (HMIS), and minimum data collection requirements for 211. Real time data entry is necessary to ensure accurate data collection and reporting.

Calls

1. Access the Calls Module from the left-hand menu.
2. When a 211 call comes in, Start New Call.

The screenshot shows the 'Call Record Search' page. On the left, a dark blue sidebar contains navigation options: Last Viewed, Favorites, Home, Calls (with a red circle '1'), Resources, Reports, Admin, and Logout. The main content area has a breadcrumb 'Calls > Call Record Search' and a search bar. Below the search bar, there is a 'Show Advanced Search' button and a 'Start New Call' button highlighted with a red circle '2'. A red circle '3' is located near the top right of the page.

Current Call

The screenshot shows the 'Add/Edit Call Record' page for a specific call. The breadcrumb is 'Calls > Add/Edit Call Record'. The page title is 'Call Record (2904) - 10/03/2023 09:31 AM'. A red circle '3' is next to the title. The form contains several sections: 'Caller Name' with fields for First, Middle, Last, and Suffix; 'U.S. Military Veteran?' with a dropdown menu; 'Age: Unknown'; 'Call Status *' with a dropdown menu; 'Add Referral' button; 'Save', 'Save & End Call', and 'Cancel Call' buttons. Below this is the 'Current Call' section with 'Call Type *' (Referral) and 'Caller Type *' (Self) dropdowns, 'Caller Alias' field, and 'Phone Number' field with a red circle 'd'. A 'Call Notes' text area is also present. Red circles 'a' through 'c' are next to the 'Caller Name', 'U.S. Military Veteran?', and 'Call Type *' fields respectively.

3. Complete as much call data as able.
 - a. **Caller Name** Fields should be left blank.
 - b. Choose the Caller's **US Military Veteran** Status from the list.
 - c. Select **Call Type** and **Caller Type** from the list if not already selected.
 - d. Enter the incoming **Phone Number**, if not autocompleted.
 - e. Complete additional assessment questions as they appear under Assessments.
 - i. Select if **Translation Assistance** is needed.
 1. If yes, choose the language from the provided list.
 2. If the language needed is not in the list select, "Different language preferred", and enter the language into the following text box.
 - ii. Enter a numerical value for the Caller's **Age**.

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- iii. Select the **Gender** that the caller associates with. If the caller associates with more than one gender, hold down the Control key on your keyboard and select each option that applies.
 - iv. Enter the **Client ZIP** and select “Apply Zip Code Information”. This will populate the **Client City**, **Caller/Client County**, and **Caller/Client State** fields using the USPS database. If the zip is not known, enter any known data in the available fields.
 - v. Choose how the caller learned about 211 in the **Referred to 211 by** field. If other, type in the response in the available text box.
 - vi. Select if the caller provided consent for a follow-up call using the **211 Follow-up Consent** field.
- f. Select Save before moving to the next step.

Assessments e

✓ DuPage CoC 211

DuPage CoC 211

Translation Assistance Needed	No (HUD) <input type="button" value="v"/>
Age	<input type="text"/>
Gender	<div style="border: 1px solid #ccc; padding: 5px;"><p>To select multiple values hold down the "ctrl" or "cmd" key and click on each value</p><ul style="list-style-type: none">Woman (Girl, if child)Man (Boy, if child)Culturally Specific Identity (e.g., Two-Spirit)TransgenderNon-BinaryQuestioningDifferent IdentityClient doesn't knowClient prefers not to answerData not collected<div style="text-align: right;"><input type="button" value="Clear All"/></div></div>
If Other Gender, specify	<input type="text"/>
Client ZIP	<input type="text"/> <input type="button" value="Apply ZIP Code Information"/>
Client City	<input type="text"/>
Caller/Client County	<input type="text"/>
Caller/Client State	-Select- <input type="button" value="v"/>
Referred to 211 by	-Select- <input type="button" value="v"/>
If other, referred to 211, please explain	<input type="text"/>
211 Follow-up Consent	-Select- <input type="button" value="v"/>

HMIS Help Desk: nilhmis.cayzu.com or (630) 407-6397

Follow Up Information

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="calendar"/> <input type="button" value="refresh"/> <input type="button" value="calendar"/>
Follow Up User	211 DuPage (8790) <input type="button" value="v"/> -Select- <input type="button" value="v"/>
Follow Up Made	-Select- <input type="button" value="v"/>
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="calendar"/> <input type="button" value="refresh"/> <input type="button" value="calendar"/>

Attachments

Date Added	Name	Description	Type	Provider	Added From
No matches.					

f

Call Status * -Select-

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4 Add Referral

Save Save & End Call Cancel Call

Referrals

4. Add Referral
5. Select up to 5 Needs from the Service Code Quicklist or use the Service Code Look-Up (to search the AIRS taxonomy database).
6. Add Terms & Go To Search Results.

Current Call
Service Transactions

Save Needs ONLY Save ALL Clear ALL Cancel

▼ Add Needs

Needs Assignment

i Select up to 5 Needs

Service Code Quicklist

Crisis Shelter (BH-1800.1500)

Extreme Cold Warming Centers (TH-2600.1880)

Extreme Heat Cooling Centers (TH-2600.1900-180)

Food Pantries (BD-1800.2000)

Homeless Shelter (BH-1800.8500)

Low Income/Subsidized Private Rental Housing (BH-7000.4600-450)

Rental Deposit Assistance (BH-2000.7050)

5 Add Terms
Service Code Look-Up
6 Add Terms & Go To Search Results

**If you are unable to find a resource or find an error, please contact 211dupage@dupageco.gov. Include the service code(s) used and the name of the resource(s).*

7. Select the Referral Provider(s) from the Referral Provider Quicklist or from the Search Results.
8. Search results can be filtered by physical location or service area.
9. Results will show the number of needs selected that this provider has a service for. Select the icon under Matched Needs to review.

Referral Provider Quicklist

7

Provider -Select-

Add Provider Bed Availability

▼ Search for Providers

i These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider Search by adding Target Populations to the Selected Service Terms or by modifying the Service Terms used for the Provider Search.

7 Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider													Type	Phone	Location	Distance	Matched Needs										
+	BEDS PLUS, Inc.												Level 3	708-354-0858 X2#	La Grange, IL 60525	N/A	1/1										
+	Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)												Level 4	800-941-8681	Villa Park, IL 60181	N/A	1/1										
+	DuPage CoC HMIS Test Emergency Shelter Project												Level 4	Unknown	Unknown	N/A	1/1										
+	DuPagePads Interim Housing Center												Level 5	630-682-3846 x1	Downers Grove, IL 60515	N/A	1/1										

Bed Availability
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Search for Providers

These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider Search by adding Target Populations to the Selected Service Terms or by modifying the Service Terms used for the Provider Search.

Refine Search with Service Terms or Target Populations

Selected Service Term	Selected Target Population (Optional)
Homeless Shelter	None Selected

[Reset Terms](#) [Remove All Terms](#) [Add New Term](#) [Add to ALL Terms](#)

8 Refine Provider Search Criteria

Search for Providers by using keywords for their Provider Name, AKA, or Description.

Search [Search](#) [Hide Advanced Search Options](#)

Search for Provider based on their Physical Location or the Area Served.

City	<input type="text"/>	State	<input type="text"/>
County / Parish	Dupage	ZIP Code	<input type="text"/>
<input type="checkbox"/> Community Services Users ONLY		Type	-Select-

[Search](#) [Clear All](#)

Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																						
BEDS PLUS, Inc.	Level 3	708-354-0858 X2#	La Grange, IL 60525	N/A	1/1																						
Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)	Level 4	800-941-8681	Villa Park, IL 60181	N/A	1/1																						
DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	N/A	1/1																						
DuPagePads Interim Housing Center	Level 5	630-682-3846 x1	Downers Grove, IL 60515	N/A	1/1																						

10. Select the **Provider Name** and select to the left of the service term to see additional information.

Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																						
BEDS PLUS, Inc.	Level 3	708-354-0858 X2#	La Grange, IL 60525	N/A	1/1																						
Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)	Level 4	800-941-8681	Villa Park, IL 60181	N/A	1/1																						
DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	N/A	1/1																						
DuPagePads Interim Housing Center	Level 5	630-682-3846 x1	Downers Grove, IL 60515	N/A	1/1																						

Provider Profile

Provider Profile - [Redacted] [Send Summary](#)

AKA: [Redacted]

Description: Provides temporary shelter for individuals and families who are homeless. Residents are required to secure employment, save money toward permanent housing and share in daily responsibilities at the shelter.

Service Information

Note: Unavailable Services are in red.

Service Code	Service Name	Action
BH-0500.3200	Housing Related Coordinated Entry	Add Referral
BH-1800.8500	Homeless Shelter	Add Referral

Showing 1-2 of 2

Secondary Services

Service Code	Service Name
No matches.	

Contact Information

Provider Telephone Numbers:

Toll-Free: 800-941-8681 (Primary)
 Fax: 630-841-8707
 Main: 630-941-8681

Provider Contacts:

Hours of Operation: 7 days per week, 24 hours per day
 Website: [Click Here](#)

Location Information

Physical: Call for details
 Villa Park, IL 60181
[Map Address](#)

County/Parish: Dupage

Mailing: 3130 Finley Road
 Suite 520
 Downers Grove, IL 60515
[Map Address](#)

County/Parish: Dupage

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11. Skip the section labeled “Referral Data” and move to the Referral table to mark which need is being referred to which resource provider(s) if not already selected.
12. A summary of the provided referrals may be emailed to the client by selecting ‘Send Summary’ and entering the recipient’s email address.
13. Select Save All.

Selected Providers

Provider	Type	Phone	Location	Last Updated
DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	08/16/2023

Showing 1-1 of 1

Refer to Providers

11 Referral Data

Needs Referral Date * 10 / 03 / 2023 9 : 51 : 34 AM

Referral Ranking -Select-

Projected Follow Up Date / /

Follow Up User 211 DuPage (8790) -Select-

Check to notify Community Services Providers by Email.

Referrals **12** Send Summary

Referred-To Provider	Send Provider Summary
DuPage CoC HMIS Test Emergency Shelter Project (8724)	211 DuPage 10/03/2023 DuPage CoC HMIS Test Emergency Shelter Project Addresses: No Address Telephone Numbers: No Telephone Number Send by Email Email Address [] Send Exit

Need Data

Date of Need * 10 / 03 / 2023 9 : 51 : 34 AM

Selected Needs

Need
Homeless Shelter (BH-1800.8500)

Remove All Needs

Save Needs **13** Save ALL Clear ALL Cancel

Add Referral Save Save & End Call Cancel Call

Call Status *

End Call

14. Update the Call Status, which will typically be “Complete”. A Call Status may be left “Incomplete” in the following situations:
 - Caller in crisis or dangerous situation.
 - Caller extremely confused or having difficulty with understanding referrals.
 - Caller requires substantial number of referrals with lots of needs.
15. Save & End Call

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Current Call | Service Transactions

Needs | Referrals | Entire Service History

Previous Referrals

Select Dates: -Select- | Start Date: / / | End Date: / / | More | Search

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
10/03/2023	10/03/2023	DuPage CoC HMIS Test Emergency Shelter Project		Homeless Shelter	Identified	

Add Referral | Showing 1-1 of 1

Add Referral | 15 | Call Status * -Select- | 14 | Save | Save & End Call | Cancel Call

16. If a Call Status is left “Incomplete”, enter a brief note about the interaction and the follow-up need by returning to the “Current Call” tab and using the Call Notes text box.

Age: Unknown | Call Status * Incomplete | Add Referral | Save | Save & End Call | Cancel Call

Current Call | Service Transactions

Call Type * Referral | 16 | Call Notes

Caller Type * Self

Caller Alias

Phone Number