Pre-Requisites

Users will need working knowledge of the <u>Standard Operating Procedures</u>, 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.

🕤 Last Viewed	Calls > Call Record Search Type here for Global Search 🖶 🛊 🖈 😨
★ Favorites	Call Record Search
f Home	If you do not enter search criteria, search results will be limited to the previous seven days worth of data. Search for Call Records by using keywords for Client name, Call ID, or User ID.
🕻 Calls 💶 ,	Search Show Advanced Search
E Resources	Search Clear 2 Start New Call
Reports	
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[→ Logout	

Current Call

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rst Mi	ddle	Last	Suffix					
Select-	~							
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					Save	Save & End Call	Cancel Cal	
				Service Transactions				
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- 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.

- 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)	~		
	Age				
	To select multiple values hold down the "ctrl" or '	cmd" key and click on each value			
	Gender	Woman (Girl, if child) Man (Boy, if child) Culturally Specific Identity (e.g. Transgender Non-Binary Questioning Different Identity Client doesn't know Client prefers not to answer Data not collected	, Two-Spirit)		
	If Other Gender, specify				
	Client ZIP		Apply ZIP Code Information		
	Client City				
	Caller/Client County				
	Caller/Client State	-Select-			
	Referred to 211 by	-Select- 🗸			
	If other, referred to 211, please explain				
	211 Follow-up Consent	-Select- 🗸			
	HMIS Help Desk: nilhmis.cayzu.com or (630) 407 Print Assessment	2-6397			
Follow Up Information					
Projected Follow Up Date	//				
Follow Up User	211 DuPage (8790) 🐱				
	-Select-				
Follow Up Made	-Select- 🗸				
Completed Follow Up Date	i C ⊞				
Attachments					
Date Added	Name	Description Type Pro	vider	Added From	
Add New File Attachment			No matches.		
				Call S	Status * -Select-
Add Referral			ſ	Save Save & End Call	Cancel Call

	Add Referral			Save	Save & End Ca		Cancel Call	
	Referrals							
4.	Add Referral							
5.	Select up to 5 Needs from the Service Cod taxonomy database).	e Quicklist or u	ise the Service C	ode Look	-Up (to sear	ch the A	AIRS	
6.	Add Terms & Go To Search Results.							
Current	Call		Service Transactions					
					Save Needs ONLY	Save ALL	Clear ALL	
▼ Ad	dd Needs							
Need	ds Assignment							
		i) Select u	ip to 5 Needs					
	rice Code Quicklist							
Extre Extre	iis Shelter (BH-1800.1500) ireme Cold Warming Centers (TH-2600.1880) reme Heat Cooling Centers (TH-2600.1900-180) d Dentrice (ID 1900.2000)							
	d Pantries (BD-1800.2000) neless Shelter (BH-1800.8500)							

*If you are unable to find a resource or find an error, please contact <u>211dupage@dupageco.gov</u>. 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.

Low Income/Subsidized Private Rental Housing (BH-7000.4600-450) Service Code Look-Up

Add Terms

9. Results will show the number of needs selected that this provider has a service for. Select the icon under Matched Needs to review.

Pro	ovider	-Select-										~	Add	Provider		Bed Availa	ability									
▼ Sear	ch for Provi	lers																								
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Add Terms & Go To Search Results

211 Calls Workflow CS 5.15

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 Remove All Terms Add New Term	▼ Se	arch	h for Provid	lers																											
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10. Select the Provider Name and select **(i)** to the left of the service term to see additional information.

Search	Results																											
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Need	Data														unty/Parish:		age											

- 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.

	Selec	ted Providers										
		Provider 🔺			Туре	Phone		Location		I	Last Update	ed
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						Showing	1-1 of 1					
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11	Refe	erral Data										
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F	Referre	ed-To Provider			Send Provide	r Summary					•	×
(DuPag 8724)	e CoC HMIS Test Emergen	cy Shelter Project		211 DuPa	ge					10/03/	/2023
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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

211 Calls Workflow CS 5.15

Current C	Call					Service Transa	ctions				
Needs				Referrals				Entire Service Histo	ry		
Previ	ious Referrals										
Select		Start Date			End Date			_		_	
-Selec	:t- 🗸	/	/ 🛱 🖯 🛱		/	_/	5		More		Search
	Need Date	Referred Date	Referred To			R	eferral Outcome	Need Type		Need Status	Need Outcome
/ 1	10/03/2023	10/03/2023	DuPage CoC HMIS Test Em	nergency Shelter Project				Homeless Shelter		Identified	
	Add Referral						Showing 1-1 of 1				
										14 o	all Status * -Select-
Add R	eferral							15	Save	Save & End C	all 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: Unkn	nown						Call Status *	Incomplete 🗸
Add F	Referral					Save	Save & End Call	Cancel Call
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Call	ller Type *	Self ~						
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Pho	one Number	X					<u>1.</u>	