

County of Simcoe

Training Manual

Training Manual

Coordinated Intake / Brief Services

County of Simcoe

Prepared by

ACRE Consulting

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CHAPTER 2: Goods and Services


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How To: Add an Express Good

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

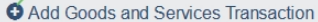
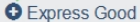
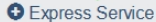
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction  Manage this Transaction  Edit this Transaction 
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Good

1. Click on the **EXPRESS GOOD** button.

 Now you're on the **Add Express Goods Transaction Screen**

The screenshot shows a web form titled "Add Express Goods Transaction". On the left side, there are several input fields: "Client Name(s)" with a red star, "Good" with a dropdown menu and a red star, "Program" with a dropdown menu and plus/minus buttons, "Unit Of Measure" with a dropdown menu and a red star, "Unit Price" with a numeric input field, "Reason for Service" with a dropdown menu and a red star, and "Comments" with a text area. At the bottom left are "Save" and "Cancel" buttons. On the right side, there is a "Goods Item Info" section with the text "No predefined item selected." and a question mark icon in the top right corner of the form area.

2. Enter the Client's name. If you arrived at this screen from the **Client - Goods and Services** List, the client has already been selected.
3. Select the Good from the drop-down list
4. Select the Program(s) this Good is associated with.
5. Select the Unit of Measure for this Good
6. Select the Unit Price (price per unit) for this Good
7. Select the Reason for Service from the drop-down list.
8. Record some comments about this Good
9. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Goods and Services** List

How To: Add an Express Service

Go to the [Goods and Services List](#)










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

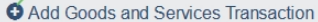
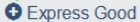
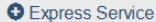
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction    Manage this Transaction Edit this Transaction
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Add an Express Service

1. Click on the **EXPRESS SERVICE** button.

 Now you're on the **Add Express Services Transaction** Screen

The screenshot shows a web form titled "Add Express Services Transaction". The form has the following fields and controls:

- Client Name(s)**: A text input field with a red asterisk indicating it is required.
- Service**: A dropdown menu with "Select an option" and a red asterisk.
- Program**: A dropdown menu with "Select an option", plus and minus buttons, and a red asterisk.
- Reason for Service**: A dropdown menu with "Select an option" and a red asterisk.
- Expended Minutes**: A text input field with a small icon on the right.
- Referred to**: A dropdown menu with "Select an option".
- Comments**: A text area with a small icon on the right.
- Buttons**: "Save" and "Cancel" buttons at the bottom.
- Services Item Info**: A box on the right containing the text "No predefined item selected."

2. Enter the Client's name. If you arrived at this screen from the Client - Goods and Services List, the client has already been selected.
3. Select the Service from the drop-down list
4. Select the Program(s) this Service is associated with.
5. Select the Reason for Service from the drop-down list
6. Enter how much time, in minutes, it took you to provide this Service
7. Select a place that you Referred the client To as a result of this Service
8. Record some comments about this Service
9. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Goods and Services List**

How To: Add a Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

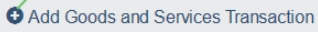
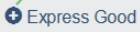
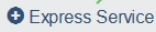
Goods and Services List

Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction    Manage this Transaction Edit this Transaction
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  


Add a new Transaction Add an Express Good Add an Express Service

1

Add a Goods and Services Transaction

1. Click on the **ADD GOODS AND SERVICES TRANSACTION** button.

 Now you're on the **Client - Add Goods and Services Transaction Screen**

The screenshot shows a web form titled "Client - Add Goods and Services Transaction". At the top left is a green icon of a document with a checkmark. The form has a white background with a dark border. It contains the following fields and controls:

- Add Client**: A button with a plus sign and the text "Add Client".
- Client Name(s)**: A dropdown menu with a red star icon to its right.
- Reason for Service**: A dropdown menu with the text "Select an option" and a red star icon to its right.
- Start Date and Time**: A date and time picker with a calendar icon and a clock icon, and a red star icon to its right.
- Program**: A dropdown menu with the text "Select an option", a plus sign button, and a minus sign button.
- Case Management Activity**: A dropdown menu with the text "Select an option".
- Number of Individuals**: A text input field.
- Referred from**: A dropdown menu with the text "Select an option".
- Referred to**: A dropdown menu with the text "Select an option".
- Referred by**: A text input field.
- Save**: A button with a floppy disk icon and the text "Save".
- Cancel**: A button with an 'X' icon and the text "Cancel".

2. Enter the Client's name. If you arrived at this screen from the Client Goods and Services List, the client has already been selected.
3. Select the Reason for Service from the drop-down list.
4. Verify the Start Date and Time. The default value is the current date and time.
5. Select the Program this Goods and Services Transaction is associated with.
6. Select the Case Management Activity this Goods and Services Transaction is associated with.
7. Enter the number of individuals being served by this Goods and Services Transaction.
8. Select the location the Client was Referred From.
9. Select the location the Client is Referred To
10. Enter the name of the person who referred the Client to you
11. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Edit Goods and Services Transaction** Screen

How To: Manage an existing Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

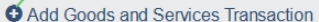

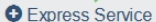
Goods and Services List

Filter: 1 Week(s) Filter by date range Filter by text
Filter items


Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	  
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  

Add a new Transaction **Add an Express Good** **Add an Express Service**

Display this Transaction
Manage this Transaction
Edit this Transaction

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Manage a Record

1. Click on  for the record you would like to manage

 Now you're on the **Manage** Screen

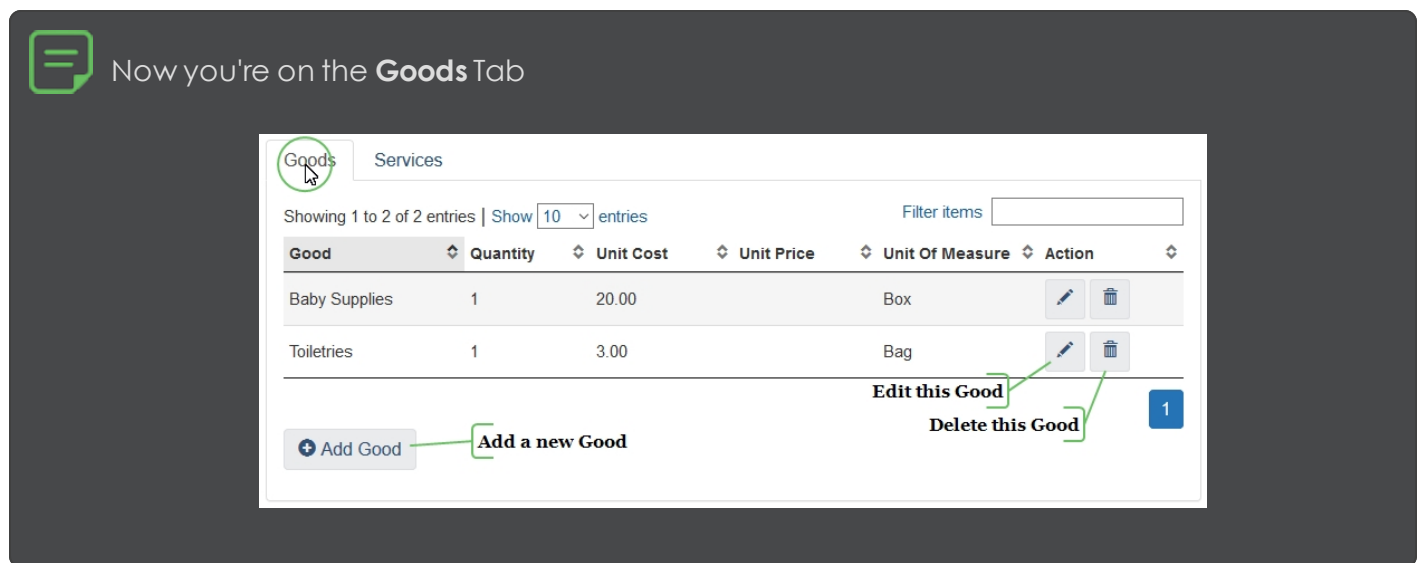
How To: Add a Good to an Existing Goods and Services Transaction

Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on the previous page\)](#).

Go to Goods Tab

1. Click on the **GOODS** tab

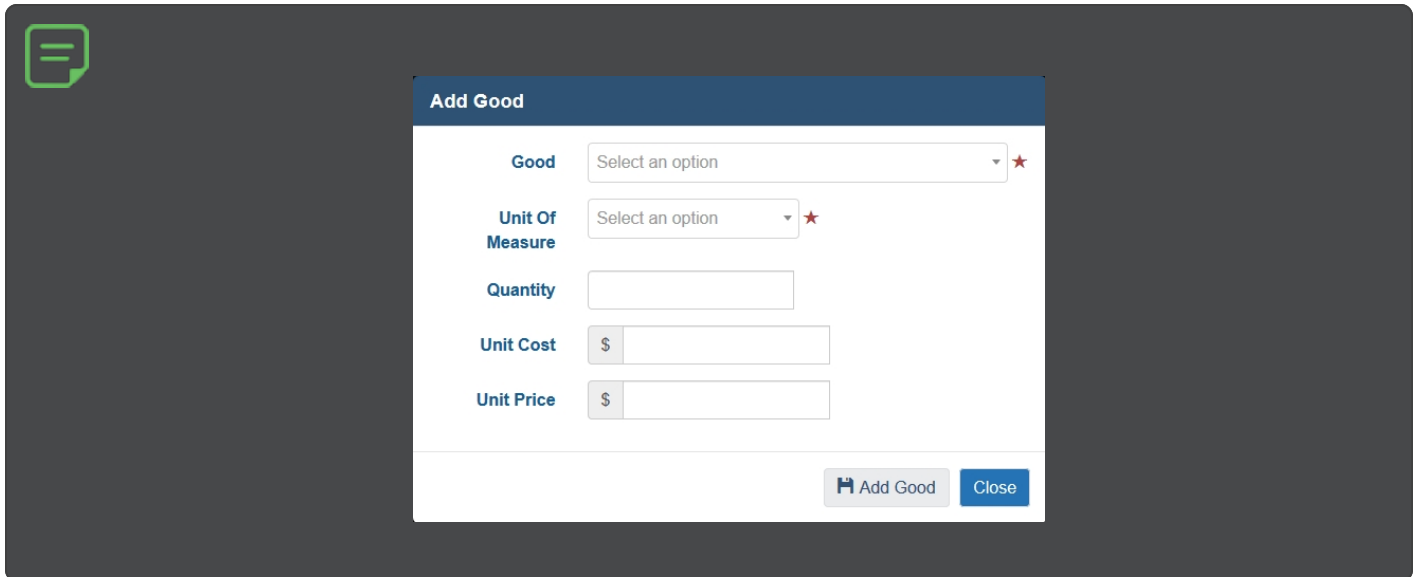


Add a Good

1. Click on the **ADD GOOD** button



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2. Select the Good from the drop-down list
3. Select the Unit of Measure
4. Optionally, enter the Quantity of Goods provided
5. Optionally, you may enter the Cost of this Good
6. Optionally, you may enter the Price of this Good
7. Click **SAVE** when done

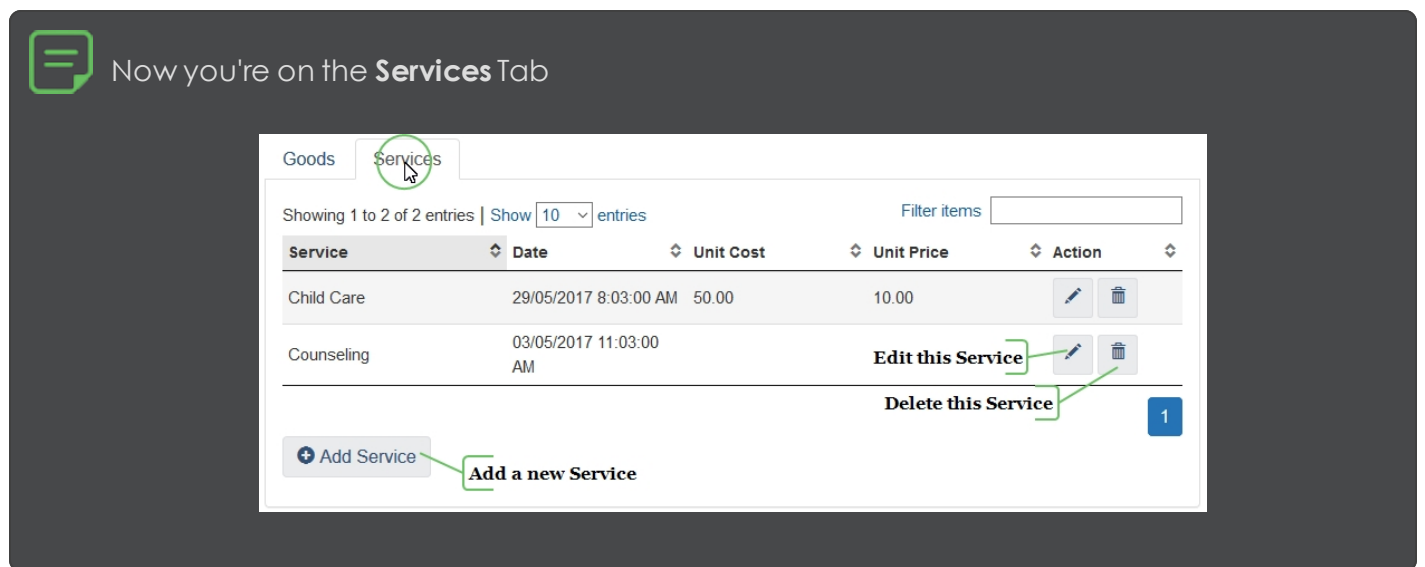
How To: Add a Service to an Existing Goods and Services Transaction

Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on page 10\)](#).

Go to Services Tab

1. Click on the **SERVICES** tab

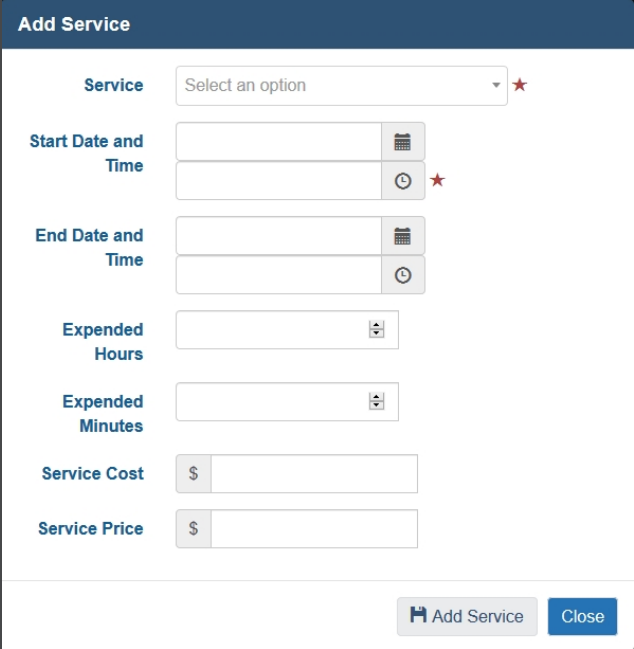


Add a Service

1. Click on the **ADD SERVICE** button



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The screenshot shows a dark grey background with a green icon in the top left corner. A white modal window titled "Add Service" is centered. The form inside has a blue header bar. The fields are: "Service" (a dropdown menu with "Select an option" and a red star), "Start Date and Time" (two input fields with a calendar icon and a clock icon, and a red star), "End Date and Time" (two input fields with a calendar icon and a clock icon), "Expended Hours" (an input field with a spinner), "Expended Minutes" (an input field with a spinner), "Service Cost" (an input field with a dollar sign), and "Service Price" (an input field with a dollar sign). At the bottom right of the modal are two buttons: "Add Service" (with a house icon) and "Close".

2. Select the Service from the drop-down list
3. Ensure that the Start Date and Time are correct
4. Optionally, enter an End Date and Time
5. Optionally, you may enter the expended amount of time that was spent delivering this Service
6. Optionally, you may enter the Cost of this Service
7. Optionally, you may enter the Price of this Service
8. Click **SAVE** when done

How To: Close a Goods and Services Transaction

Go to the Goods and Services List










1. Click on the **FRONT DESK MENU**
2. Click on **GOODS AND SERVICES**

 Now you're on the **Goods and Services List**

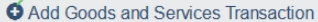
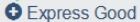
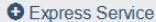
Goods and Services List


Filter: 1 Week(s) Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Start Date - End Date	Details	Action
Kent, Clark	2017-10-24 - 2017-10-24	Food	  
Rogers, Steve	2017-10-23 - 2017-10-23	<ul style="list-style-type: none">3 Goods / Services• Goods• Services<ul style="list-style-type: none">◦ Advocacy◦ Counseling◦ Financial Aid	Display this Transaction    Manage this Transaction Edit this Transaction
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	  

Add a new Transaction Add an Express Good Add an Express Service

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

Edit a Record

1. Click on  or  Edit for the record you would like to edit

 Now you're on the **Edit** Screen

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Add an End Date

1. Add a value to the End Date field
2. Click **SAVE** when done



Now you're on the **Display Goods and Services** Screen

CHAPTER 3: Assessments

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How To: Add a VI-SPDAT

Go to the SPDAT List

1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**



Now you're on the **SPDAT Intake List**

Go to the VI-SPDAT Tab

1. Click on the **VI-SPDAT** tab



Now you're on the **VI-SPDAT Tab**

SPDAT Intake List

Filter: All

Filter by date

VI-SPDAT

SPDAT

Filter by text

Filter items

Showing 1 to 5 of 5 entries | Show 10 entries

Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action
Allen, Barry	2016-11-15 08:16 AM	Bigalow, Sam	Adult	1	9	
Allen, Barry	2017-01-05 07:55 AM	LeBlanc, Miguel	Adult	1		
Doe, Johnny	2017-03-03 12:58 PM	Abbott, Jason	Adult	1	11	
Kent, Darren	2016-10-20 10:33 AM	Abouanni, Charbel	Adult	2	13	
Kent, Darren	2017-02-15 05:00 PM	Fulford, Darren	Adult	1	9	

Add a new VI-SPDAT

(select the button for the version you would like to complete)

Start a new VI-SPDAT assessment by selecting one of the following.

+ Adult v1 + Adult v2 + Family v1 + Family v2 + Youth v1

Display this VI-SPDAT

Edit this VI-SPDAT

Delete this VI-SPDAT

1

Add a VI-SPDAT

1. Choose which version of VI-SPDAT you would like to do (i.e. VI-SPDAT v2, F-VI-SPDAT v2, TAY-VI-SPDAT v1)
2. Click on the button corresponding to the type of VI-SPDAT you would like to do (for example, if you wanted to do a TAY-VI-SPDAT v1, click on the **+YOUTH V1** button)

Now you're on **Add VI-SPDAT** Screen for the type of VI-SPDAT you selected

New VI-SPDAT Version 2 Intake VI-SPDAT Type

Client Name *

Caseworker *

Start Date and Time *

Pre-Screen Period *

Consent No

Program + -

Description

History of Housing and Homelessness

#	Question	Answer	Refused
			No

Questions of the VI-SPDAT type selected

Save Cancel

3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Pre-Screen Period for this VI-SPDAT assessment. What this means is how many times has this client completed a VI-SPDAT? Is this the first, second, etc. time?

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7. If applicable, indicate whether the client was pregnant at the time of the VI-SPDAT assessment (only asked for some VI-SPDAT versions)
8. Indicate whether the client provided consent to complete this assessment
9. Select the program this assessment was completed in
10. Add a description about this assessment
11. For each question on the VI-SPDAT, select the Client's answer. If the Client did not answer, toggle Refused to "Yes"
12. Click the **SAVE** button.



Now you're on **Display VI-SPDAT** Screen

How To: Add a SPDAT

Go to the SPDAT List

1. Click on the **FRONT DESK MENU**
2. Click on **ASSESSMENTS**
3. Click on **SPDAT**



Now you're on the **SPDAT Intake List**

Go to the SPDAT Tab

1. Click on the **SPDAT** tab



Now you're on the **SPDAT** tab

SPDAT Intake List

Filter: 1 Year(s) **Filter by date**

VI-SPDAT **SPDAT** **Filter by text**

Showing 1 to 2 of 2 entries | Show 10 entries

Client Name	Start Date and Time	Caseworker	Type	Version	Score	Action
Granger, Hermione	23/07/2017 6:54:00 AM	Test, Adil	Youth	1	38	[Edit] [View] [Delete]
Granger, Hermione	17/05/2017 10:21:00 AM	LeBlanc, Miguel	Adult	4	32	[Edit] [View] [Delete]

Add a new SPDAT
(select the button for the version you would like to complete)

Start a new SPDAT assessment by selecting one of the following:

+ Adult v3 + Adult v4 + Family v1 + Family v2 + Youth v1

Display this SPDAT **Edit this SPDAT** **Delete this SPDAT**

Add a SPDAT

1. Choose which version of SPDAT you would like to do (i.e. SPDAT v4, F-SPDAT v2, Y-SPDAT v1)
2. Click on the button corresponding to the type of SPDAT you would like to do (for example, if you wanted to do an F-SPDAT v2, click on the **+FAMILY V2** button)



Now you're on the **Add SPDAT** screen for the type of SPDAT you selected

New SPDAT Version 1 Intake SPDAT Type

Client Name ★

Caseworker ★

Start Date and Time ★

Assessment Period ★

Consent No

Program + -

Description

Wellness

#	Question	Answer

Questions of the SPDAT type selected

2
 3
 4

3. Select the Client Name. If you arrived here from the **Client - SPDAT List** screen, this field is already filled out.
4. Select the caseworker who completed the assessment
5. Confirm the start date and time. If needed, you can change this date and time manually.
6. Select the Assessment Period for this SPDAT assessment
7. Indicate whether the client provided consent to complete this assessment
8. Select the program this assessment was completed in
9. Add a description about this assessment

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10. For each component on the SPDAT, fill in, at a minimum, the numerical value in the Answer column. Optionally, you can also provide some comments for each component.
11. Click the **SAVE** button.



Now you're on the **Display SPDAT** screen


How To: Complete New Survey

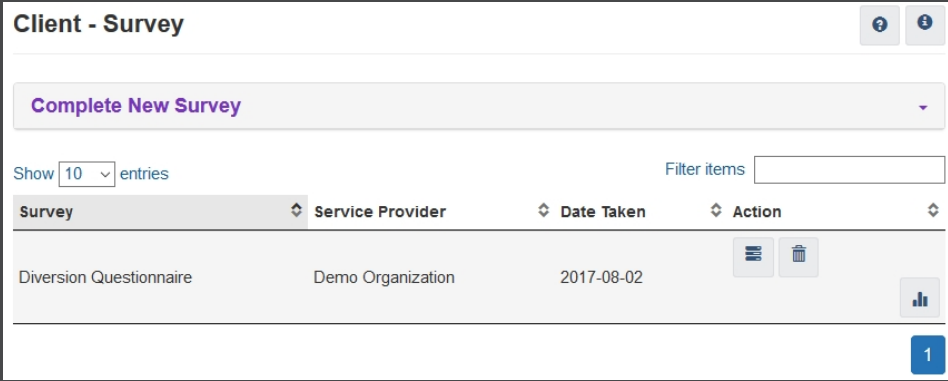
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)

Go to the Client Surveys List

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **SURVEYS**


 Now you're on the **Client - Survey** screen

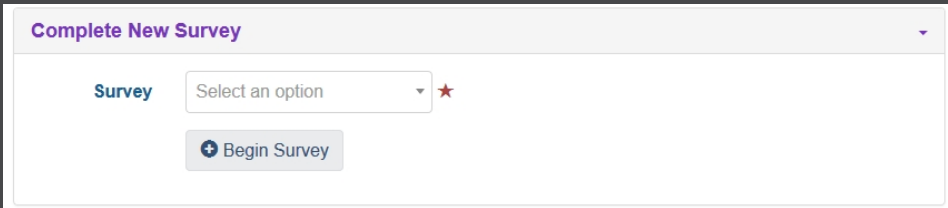


The screenshot shows the 'Client - Survey' interface. At the top, there is a 'Complete New Survey' button. Below it, there is a table with columns: Survey, Service Provider, Date Taken, and Action. The table contains one row: 'Diversion Questionnaire', 'Demo Organization', '2017-08-02'. There are also icons for filtering and deleting items. A 'Show 10 entries' dropdown and a 'Filter items' search box are also visible.

Add a Survey

1. Click on **COMPLETE NEW SURVEY**

 A new field will reveal, prompting you to select a Survey



The screenshot shows the 'Complete New Survey' dialog box. It features a dropdown menu labeled 'Survey' with the text 'Select an option' and a red star icon. Below the dropdown is a button labeled '+ Begin Survey'.

2. Select the Survey you would like to complete
3. Click on **+BEGIN SURVEY**

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Now you're on the **Take Survey** screen for the Survey you selected

#	Question	Response
1	What's the client's favourite colour?	Select an option
2	How many pets does the client have?	

4. Confirm the date the Survey was taken
5. For each question on the Survey, answer the question
6. Click the **SAVE** button



Now you're on the **Client - Survey** screen

CHAPTER 4:

Waiting Lists

Although the Waiting Lists module was designed for the purpose of tracking who is waiting for what and for how long, other creative uses of the Waiting Lists module are possible. Some examples:

- » The Waiting List module could be easily used for Prioritization or a By-Name List. Although the Waiting List does automatically calculate how long a person has been waiting, that field could be ignored in your community.
- » The Waiting List could also be used as a referrals section, by creating a Waiting List that is shared between two Service Providers. One Service Provider could add people to the Waiting List and the other Service Provider could take them off when they have been received.
- » The Waiting List could be used as a "to do list" by a team of assessment workers who want a central repository where they can see a list of who has been assessed, who has been contacted by a colleague, who has an appointment booked, and who needs to be assessed.


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How To: See what Waiting List(s) a Client is on	29
How To: Add a Client to a Waiting List	30
How To: Change a Client's Status on a Waiting List	33
How To: Remove a Client from a Waiting List	35

How To: See who is on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

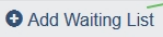
Waiting Lists

Filter: All **Filter by date range**

Show 10 entries

Filter by text
Filter items

Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List


Display this Waiting List
Edit this Waiting List
Manage the Clients on this Waiting List

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

County of Simcoe
Training Manual

Prioritization List Manage Clients

Active Closed

Filter by active status

Filter by text
Filter items

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	- -	0	High	Waiting - No Offers	2016-12-21	
Wayne, Bruce	2016-11-02	- -	49	Normal	Waiting - Declined 1	2016-12-21	

Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List ✕ Cancel Return to Waiting Lists

1


How To: See what Waiting List(s) a Client is on

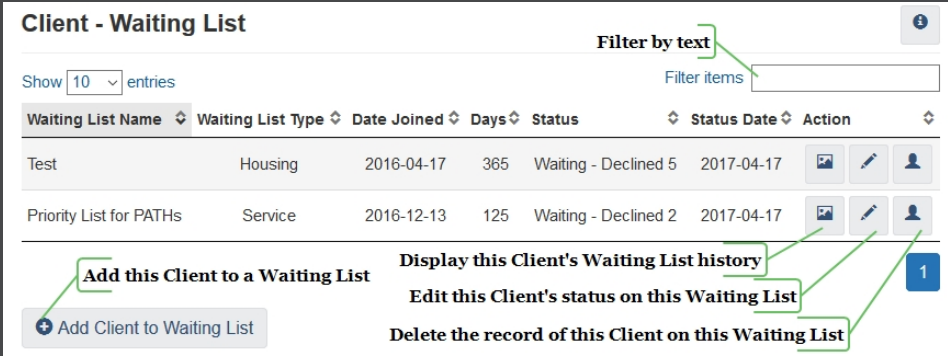
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)







Go to the Client Waiting List Screen

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

 Now you're on the **Client - Waiting List** Screen



The screenshot shows the 'Client - Waiting List' interface. At the top right, there is a 'Filter by text' input field. Below it, a table lists waiting lists with columns for 'Waiting List Name', 'Waiting List Type', 'Date Joined', 'Days', 'Status', and 'Status Date'. The table contains two entries: 'Test' (Housing, 2016-04-17, 365 days, Waiting - Declined 5) and 'Priority List for PATHs' (Service, 2016-12-13, 125 days, Waiting - Declined 2). Below the table, there is an 'Add Client to Waiting List' button. To the right of the table, there are three callout boxes with arrows pointing to the table's action icons: 'Display this Client's Waiting List history' (pointing to the eye icon), 'Edit this Client's status on this Waiting List' (pointing to the pencil icon), and 'Delete the record of this Client on this Waiting List' (pointing to the person icon). A blue box with the number '1' is also visible near the bottom right of the table.

Waiting List Name	Waiting List Type	Date Joined	Days	Status	Status Date	Action
Test	Housing	2016-04-17	365	Waiting - Declined 5	2017-04-17	  
Priority List for PATHs	Service	2016-12-13	125	Waiting - Declined 2	2017-04-17	  


How To: Add a Client to a Waiting List

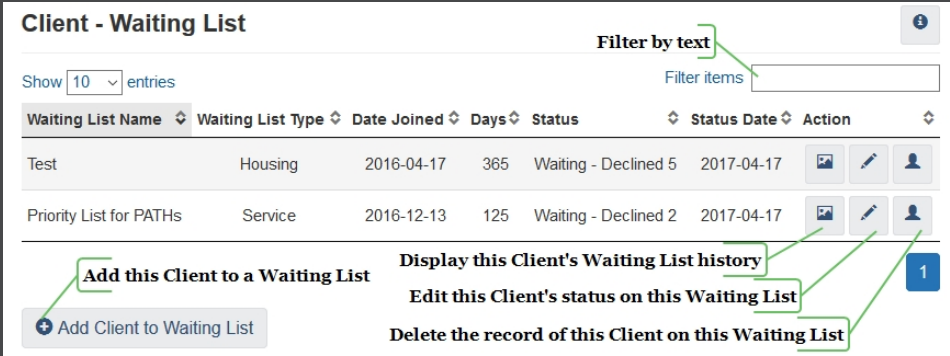
Open a Client File

If you don't already have a Client File open, open one. See [Open a Client File \(on page 1\)](#)

Go to the Client Waiting List Screen

1. Click on the **CLIENT MANAGEMENT MENU**
2. Click on **WAITING LISTS**

 Now you're on the **Client - Waiting List** Screen



The screenshot shows the 'Client - Waiting List' interface. At the top, there is a 'Filter by text' search bar and a 'Show 10 entries' dropdown. Below this is a table with columns: 'Waiting List Name', 'Waiting List Type', 'Date Joined', 'Days', 'Status', 'Status Date', and 'Action'. Two rows are visible: 'Test' (Housing, 2016-04-17, 365 days, Waiting - Declined 5, 2017-04-17) and 'Priority List for PATHs' (Service, 2016-12-13, 125 days, Waiting - Declined 2, 2017-04-17). Below the table is a button 'Add Client to Waiting List' and three callout boxes pointing to the 'Action' column icons: 'Add this Client to a Waiting List' (points to the plus icon), 'Display this Client's Waiting List history' (points to the camera icon), and 'Delete the record of this Client on this Waiting List' (points to the trash icon). A blue notification bubble with the number '1' is also present.

Add Client to a Waiting List

1. Click on the **ADD CLIENT TO WAITING LIST** button.

Client - Add Client to Waiting List



Waiting List Name Sample Waiting List ★

Client Name ★

Start Date ★

End Date

Priority Select an option ★

Reason for Being on List Select an option ★

Status on Waiting List Select an option ★

Status Date ★

Comments

Edit ▾ Insert ▾ Format ▾ View ▾ Table ▾

Font Sizes ▾ **A** ▾ **A** **B** *I* U

p Words: 0

Save Cancel

2. Select the Waiting List you would like to add the Client to. If you arrived here from **Manage Clients Screen**, this is pre-filled.
3. Select the name of the Client you would like to add. If you arrived here from **Client Waiting List Screen**, this is pre-filled.
4. Verify the Start Date. This is the date on which the Client is added to the Waiting List.
5. Leave the End Date blank. You will add a value here when the Client is removed from the Waiting List.
6. Complete all the remaining mandatory and optional fields, as instructed by your supervisor.



At the time of creating these materials, we are unable to customize some of these drop-down menus.

In Waterloo, for the interim period, follow these instructions:



- » For the "Priority" field, select one of the following, as appropriate:
 - » If the client is on the CHAC Waiting List, indicate their CHAC Priority:
 - » CHAC - Escaping Violence
 - » CHAC - Homeless
 - » CHAC - SPP-AHT
 - » CHAC - SPP-V
 - » CHAC - Terminally Ill
 - » Or, if the client has no special status, select CHAC - General
 - » If the client is on the PATHS List, indicate their current PATHS Status:
 - » PATHS - Added to List
 - » PATHS - Offer Ready
 - » PATHS - Prioritized and Matched
 - » PATHS - Support Agreement
- » For the "Reason for Being on List" field, select "Other"
- » For the "Status on Waiting List" field, select "Waiting - No Offers"
- » Use the "Comments" field to record any additional notes about this client's involvement

7. Click **SAVE** when done




Now you're on the **Manage Clients Screen**

How To: Change a Client's Status on a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

Waiting Lists

Filter: All **Filter by date range**

Show 10 entries

Filter by text
Filter items

Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List

Add Waiting List

Display this Waiting List

Edit this Waiting List

Manage the Clients on this Waiting List

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

County of Simcoe Training Manual

Prioritization List Manage Clients

Active Closed

Name of Waiting List

Filter by active status

Show 10 entries

Filter by text

Filter items

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	- -	0	High	Waiting - No Offers	2016-12-21	
Wayne, Bruce	2016-11-02	- -	49	Normal	Waiting - Declined 1	2016-12-21	

Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List X Cancel Return to Waiting Lists

You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on or Edit for the record you would like to edit

Now you're on the **Edit** Screen

Change a Client's Waiting List Status


1. Select a different option in the Status on Waiting List field
2. Verify that the Status Date is accurate
3. Click **SAVE** when done, or **CANCEL** to go back

Now you're on the **Manage Clients** Screen

How To: Remove a Client from a Waiting List

Go to the Waiting Lists

1. Click on the **FRONT DESK MENU**
2. Click on **WAITING LISTS**










 Now you're on the **Waiting Lists** Screen

Waiting Lists

Filter: All **Filter by date range**


Show 10 entries


Filter by text
Filter items


Waiting List Name	Waiting List Type	Start Date and Time	Action
Housing First	Housing	2016-11-24	  
Prioritization List	Service	2016-12-21	  
Supportive Housing	Housing	2016-12-21	  

Add a new Waiting List

Add Waiting List

Display this Waiting List 

Edit this Waiting List 

Manage the Clients on this Waiting List 

1

Manage Clients

1. Click on the  button

 Now you're on **Manage Clients** Screen

County of Simcoe Training Manual

Prioritization List Manage Clients

Active Closed

Name of Waiting List

Filter by active status

Show 10 entries

Filter by text

Filter items

Client Name	Start Date and Time	End Date and Time	Days	Priority	Status	Status Date	Action
Rogers, Steve	2016-12-21	--	0	High	Waiting - No Offers	2016-12-21	
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Add a Client to this Waiting List

Display this Client's Waiting List history

Edit this Client's status on this Waiting List

Delete the record of this Client on this Waiting List

+ Add Client to Waiting List × Cancel Return to Waiting Lists

You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **WAITING LISTS** instead of using the Front Desk Menu.

Edit a Record

1. Click on or for the record you would like to edit

Now you're on the **Edit** Screen

Remove a Client from the Waiting List

1. Add a value to the End Date field
2. Optional: also select a Status on Waiting List option to reflect the reason why they are being removed from the Waiting List. If you do so, ensure that the Status Date matches the End Date.
3. Click **SAVE** when done, or **CANCEL** to go back

Now you're on the **Manage Clients** Screen