

County of Simcoe

Training Manual

Training Manual

Outreach / Non Housing First Case Management / Ongoing Support

County of Simcoe

Prepared by

ACRE Consulting

2018-12-21



Contents

CHAPTER 2: Case Management

| | |
|--|----|
| Understanding Case Management in HIFIS 4 | 5 |
| Case Management List | 7 |
| Client - Case Management List | 8 |
| How To: Add a Case | 9 |
| How To: Display a Case | 11 |
| How To: Edit a Case | 12 |
| How To: Close a Case | 13 |
| How To: Add a Session to an Existing Case | 14 |
| How To: Add a Session to Multiple Existing Cases | 17 |
| How To: Display a Session | 19 |
| How To: Display All Sessions for this Case | 20 |
| How To: Edit a Session | 22 |
| How To: Add a Session Appointment | 23 |
| How To: Add Notes to an Existing Session | 25 |
| How To: Add Notes to an Existing Case | 27 |
| How To: Add a Document to an Existing Case | 29 |

CHAPTER 3: Goods and Services

| | |
|---|----|
| How To: Add an Express Good | 31 |
| How To: Add an Express Service | 33 |
| How To: Add a Goods and Services Transaction | 35 |
| How To: Manage an existing Goods and Services Transaction | 37 |
| How To: Add a Good to an Existing Goods and Services Transaction | 38 |
| How To: Add a Service to an Existing Goods and Services Transaction | 40 |
| How To: Close a Goods and Services Transaction | 42 |

CHAPTER 4: Group Activities

| | |
|--|----|
| How To: Add a Group Activity | 45 |
| How To: Manage an Existing Group Activity | 47 |
| How To: Add Clients to a Group Activity as Attendees | 48 |
| How To: Mark a Single Client as Attended | 49 |
| How To: Mark All Clients as Attended | 50 |

| | |
|---|----|
| How To: Add Anonymous Attendees to a Group Activity | 51 |
| How To: Track Demographics of Attendees at a Group Activity | 52 |
| How To: Add Staff to a Group Activity as Organizers | 53 |
| How To: Add External Organizers to a Group Activity | 54 |
| How To: Add Comments to a Group Activity | 56 |
| How To: Duplicate a Group Activity | 57 |

CHAPTER 5: Assessments

| | |
|-----------------------------------|----|
| How To: Add a VI-SPDAT | 59 |
| How To: Add a SPDAT | 62 |
| How To: Complete New Survey | 65 |

CHAPTER 6: Waiting Lists

| | |
|--|----|
| How To: See who is on a Waiting List | 68 |
| How To: See what Waiting List(s) a Client is on | 70 |
| How To: Add a Client to a Waiting List | 71 |
| How To: Change a Client's Status on a Waiting List | 73 |
| How To: Remove a Client from a Waiting List | 75 |

CHAPTER 2: Case Management

Chapter Contents

| | |
|--|----|
| Understanding Case Management in HIFIS 4 | 5 |
| Case Management List | 7 |
| Client - Case Management List | 8 |
| How To: Add a Case | 9 |
| How To: Display a Case | 11 |
| How To: Edit a Case | 12 |
| How To: Close a Case | 13 |
| How To: Add a Session to an Existing Case | 14 |
| How To: Add a Session to Multiple Existing Cases | 17 |
| How To: Display a Session | 19 |
| How To: Display All Sessions for this Case | 20 |
| How To: Edit a Session | 22 |
| How To: Add a Session Appointment | 23 |
| How To: Add Notes to an Existing Session | 25 |
| How To: Add Notes to an Existing Case | 27 |
| How To: Add a Document to an Existing Case | 29 |

Understanding Case Management in HIFIS 4



The Case Management module contains **Case Files**. A Case File in HIFIS 4 is a type of **service record** that indicates that a **Client** is working with a **Caseworker** during a particular **date range** to achieve a particular **goal**.

The Case Management module is the logical place to store information regarded to case management activities. Features of the Case Management module include:

- » Opening a Case File to store a related series of information about activities with a Client
- » Assigning a Caseworker to the Client
- » Including other family members in the Case File
- » Selecting a goal that the Caseworker and the Client are working towards
- » Setting a target date for the completion of the goal
- » Indicating what are the contributing barriers or factors impacting the completion of this goal
- » Tracking the status of the Case File
- » Recording individual activities (Sessions) that are completed while pursuing this goal
- » Setting appointments for this Case File
- » Keeping case notes (Comments) related to this Case File
- » Attaching files (Documents) to this Case File
- » Custom Table support



One Case Per Goal

Each Case File has a one-to-one relationship with a goal (sometimes referred to as the desired outcome for that Case File). In other words, for every Case File, there is exactly one goal, and for every goal, there is exactly one Case File.

When used as intended, a Client could often have multiple cases open at a time. Each time a Caseworker meets with a client, they would first choose which goal the meeting (or Session) was related to, and record it in the appropriate Case File.



Example: Multiple Case Files in Practice

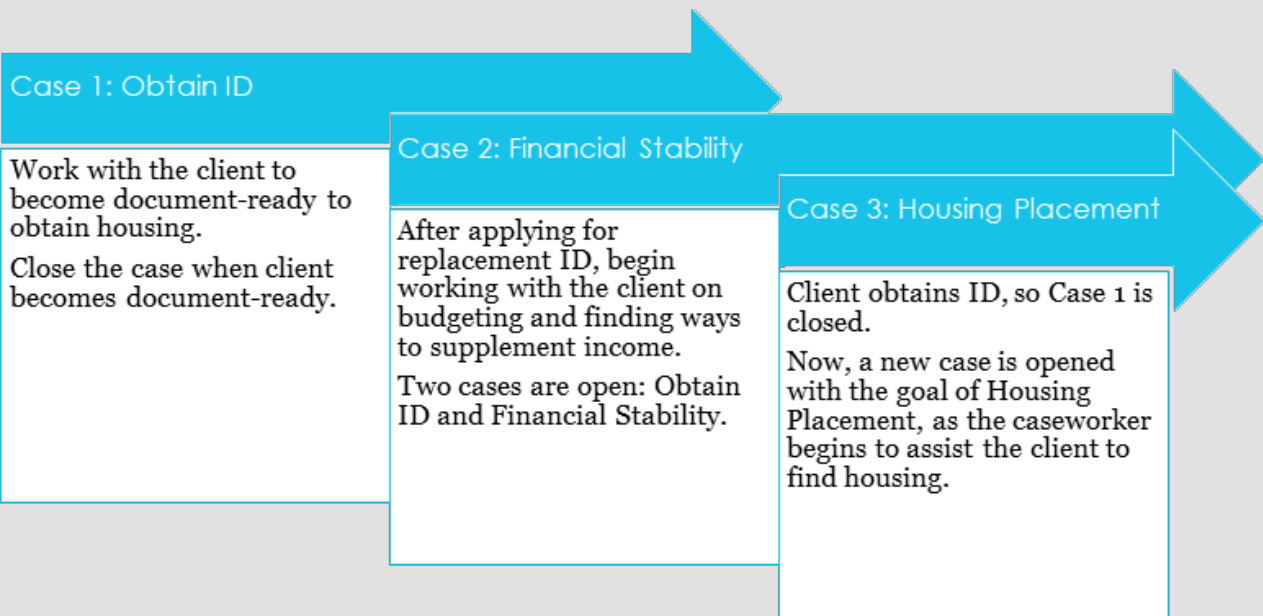
Imagine that Jasmine the Caseworker has been assigned to the client Aladdin, who is homeless. Jasmine sits down and meets with Aladdin, and they decide that the most



important first step for Aladdin would be to obtain valid identification. His wallet was stolen while he was homeless and now he doesn't have any ID at all. Jasmine opens a case in HIFIS with the goal of "Obtain ID." Over the next few weeks, Jasmine meets with Aladdin several times, which she records as Sessions within the Case File with the goal of "Obtain ID."

Finally, applications are in the mail, and Jasmine starts to switch gears and work with Aladdin on Financial Stability. She's noticed that he doesn't have a solid idea of what his monthly budget should be. She opens a second Case in HIFIS with the goal of "Financial Stability" even though the first Case File is not closed yet. She meets with Aladdin a few times, focusing on the goal of Financial Stability, before Aladdin's replacement identification arrives in the mail. She closes the Obtain ID Case File with a status of "Closed - Success." Now that Aladdin has all the documents he needs to be able to sign a lease, Jasmine opens a new Case File with the goal of "Housing Placement."

Having two open Cases for Aladdin, sometimes when Jasmine meets with him, they work on both goals simultaneously. These times, she can add a "Multiple Goal Session," indicating that she met with Aladdin and in one Session they worked on two or more Goals.



Case Management List

The **Case Management List** is reached via the Front Desk Menu by clicking on **CASE MANAGEMENT**. This page shows a list of all Cases opened by the active Service Provider, which can be filtered to only show a sub-section of all Cases.

Case Management List



Past Target Date (1) **Show only Cases past their Target Date**

Filter Options **Filter Cases**

Showing 1 to 6 of 6 entries | Show entries

| Client Name | Caseworker | Start Date | Goal | Status | Actions |
|--------------------------------------|--------------|------------|------------------------|--|---------|
| Gale, Dorothy | Lhu, Cthu | 2017-12-11 | Financial Stability | Open Past Target Date! Target Date: 2018-05-10 | |
| Hearts, Queen of | Lhu, Cthu | 2017-11-14 | Mental Health | Closed - Success Target Date: N/A | |
| Van Helsing, Abraham | Lhu, Cthu | 2017-09-28 | Employment | Open Upcoming Target Date! Target Date: 2018-08-17 | |
| Rabbit, White | King, Yellow | 2017-07-18 | Conflict Resolution | Closed - Success Target Date: N/A | |
| Dracula, Count | Lhu, Cthu | 2017-05-15 | Skill Enhancement | Closed - Goal(s) not met Target Date: N/A | |
| Nemo, Captain | Lhu, Cthu | 2017-05-09 | Employment Maintenance | Open Target Date: N/A | |

Add Case **Add new Case**

Display this Case **Edit this Case**

1

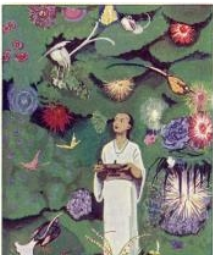
Client - Case Management List

The **Client - Case Management List** is reached via the Client Management Menu by clicking on Case Management. This page shows a list of all Cases belonging to the active Client, which can be filtered to only show a sub-section of all Cases.

The Client - Case Management List shows all Cases belonging to the active Client, including ones opened by other Service Providers. Therefore, the information on this page (Caseworker, Service Provider, Goal, Status, and Target Date) are shared with Users at other Service Providers. However Users can only Display or Edit Case Files that have been opened by Service Providers that the User has been granted appropriate Rights to.

Client Information ▾

Client Management ▾



Aladdin Ali

| | |
|----------------|-----------------|
| Consent Status | Active |
| File Number | 000000019 |
| Current Stay | Not Booked In |
| Gender | Male |
| Date of Birth | 1973-06-18 (45) |
| Family | Yes |

Client - Case Management List

Open
Closed
All
Filter by case status

Past Target Date (1)
Show only Cases past their Target Date

Show 10 entries
Filter by text

| Caseworker | Service Provider | Goal | Status | Action |
|--------------|---------------------|---------------------|---|---|
| Clark, Chris | Sharing is Caring | Employment | Open Target Date: 2017-12-31 ▲ Past Target Date! | |
| Smith, Sam | Wonderland Shelter | Financial Stability | Open Target Date: N/A | |
| Adams, Alex | My Service Provider | Shelter Diversion | Open Target Date: N/A | 📄 ✎ |
| Adams, Alex | My Service Provider | Skill Enhancement | Open Target Date: 2018-01-31 ▲ Past Target Date! | 📄 ✎ |

Add new Case

+ Add Case
+ Client - Multiple Goal Session

Add new Session where multiple Goals were worked towards

Display this Case

Edit this Case

1

How To: Add a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on the previous page\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Add a Case

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



Now you're on the **Client - Add Case Management** screen

Client - Add Case Management

Client Name *

Family Members + -

Caseworker *

Goal *

Status *

Start Date *

Target Date

Program + -

Contributing Factors + -

Training Manual

2. Select the Client Name. If you arrived here from the **Client - Case Management List** screen, this field is already filled out.
3. If there are any family members associated with this case, choose the family members involved by selecting them in the Family Members field.



The Family Members field will only display if the selected client has family members.

4. Select the Caseworker assigned to the case.
5. Select the Goal for this Case.
6. Select the Case Status. Most of the time, this should be "Open."
7. Verify the Start Date. The default value is the current date, but this can be changed if needed.
8. Enter the Target Date for completion of this Case.
9. Select the Program(s) this Case is part of.
10. Select any of the Client's existing Contributing Factors that are related to this Case.
11. Click the **SAVE** button.



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

How To: Display a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on page 8\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Display

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



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

How To: Edit a Case

Go to the Case Management List

1. Click on the **FRONT DESK MENU**
2. Click on **CASE MANAGEMENT**



Now you're on the [Case Management List \(on page 7\)](#)



Alternatively, you could open a **Client File** and use the **Client Management Menu** to go to the [Client - Case Management List \(on page 8\)](#) instead of going to the [Case Management List \(on page 7\)](#).

Edit a Record

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



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

How To: Close a Case

Edit a Case

See [Edit a Case \(on the previous page\)](#)

Close the Case

1. Change the Status field to either "Closed - Success" or "Closed - Goal(s) not met"
2. Verify the End Date
3. Click on **SAVE**


How To: Add a Session to an Existing Case

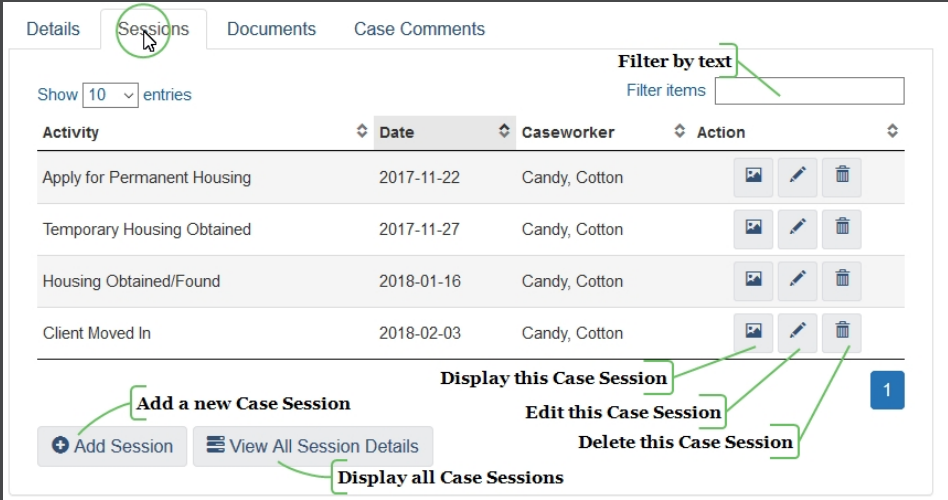
Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

 You're now on the **Sessions** tab



Details **Sessions** Documents Case Comments

Filter by text
Filter items

Show 10 entries

| Activity | Date | Caseworker | Action |
|-----------------------------|------------|---------------|--------|
| Apply for Permanent Housing | 2017-11-22 | Candy, Cotton | |
| Temporary Housing Obtained | 2017-11-27 | Candy, Cotton | |
| Housing Obtained/Found | 2018-01-16 | Candy, Cotton | |
| Client Moved In | 2018-02-03 | Candy, Cotton | |

Add a new Case Session

Display this Case Session

Edit this Case Session

Delete this Case Session


Display all Case Sessions

1

+ Add Session **≡** View All Session Details

Add a Case Session

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

 You're now on the **Client - Add Case Session** screen

County of Simcoe
Training Manual

Client - Add Case Session

Goal **General**

Activity Select an option ★

Description

Date and Time

Expended Time

Expended Hours

Expended Minutes

Caseworker Select an option ★

Responsibility Select an option

Agency Involved / Referral Select an option

Client Present No

Family Present No

Save Cancel

2. Select an Activity to reflect what occurred during this Session.
3. Enter a Description.
4. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
5. Enter the duration of this Session in Hours and Minutes.
6. Select the name of the Caseworker who met with the Client this Session.
7. Select whose Responsibility it is to follow-up on the Session.
8. Select if there was an outside Agency involved in this Session.
9. Indicate whether the Client was present.
10. Indicate whether the client's Family was present.
11. Click the **SAVE** button.

County of Simcoe
Training Manual



You're now on the **Display Case Management** Screen

How To: Add a Session to Multiple Existing Cases

Go to the Client Case Management List

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



Now you're on the [Client - Case Management List \(on page 8\)](#)

Add a Case Session

1. Click on the **CLIENT - MULTIPLE GOAL SESSION** button



You're now on the **Client - Multiple Goal Session** screen

Client - Multiple Goal Session

Goals Select an option + - ★

Activity Select an option ▼ ★

Description

Date and Time [Calendar Icon] [Clock Icon] ★

Expended Time

Expended Hours [Spinner]

Expended Minutes [Spinner]

Caseworker Select an option ▼ ★

Responsibility Select an option ▼

Agency Involved / Referral Select an option ▼

Client Present No

Family Present No

Save **Cancel**

Training Manual

2. Select the Goals that this Session was working towards.
3. Select an Activity to reflect what occurred during this Session.
4. Enter a Description.
5. Verify the Date and Time of this Session. The default value is the current date and time, but this can be changed if needed.
6. Enter the duration of this Session in Hours and Minutes.
7. Select the name of the Caseworker who met with the Client this Session.
8. Select whose Responsibility it is to follow-up on the Session.
9. Select if there was an outside Agency involved in this Session.
10. Indicate whether the Client was present.
11. Indicate whether the client's Family was present.
12. Click the **SAVE** button.



You're now on the **Client - Case Management List** screen

How To: Display a Session

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab

Details **Sessions** Documents Case Comments

Filter by text
Filter items

Show 10 entries

| Activity | Date | Caseworker | Action |
|-----------------------------|------------|---------------|--------|
| Apply for Permanent Housing | 2017-11-22 | Candy, Cotton | |
| Temporary Housing Obtained | 2017-11-27 | Candy, Cotton | |
| Housing Obtained/Found | 2018-01-16 | Candy, Cotton | |
| Client Moved In | 2018-02-03 | Candy, Cotton | |

Add a new Case Session
+ Add Session View All Session Details

Display all Case Sessions

Display this Case Session
Edit this Case Session
Delete this Case Session

1

Display

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

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

How To: Display All Sessions for this Case

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

The screenshot shows the 'Sessions' tab selected in a software interface. A notification bubble at the top left says 'You're now on the Sessions tab'. The interface includes a 'Filter by text' search bar, a table of sessions, and action buttons. Annotations with green boxes and arrows point to the 'Sessions' tab, the search bar, the table, and the 'View All Session Details' button.

| Activity | Date | Caseworker | Action |
|-----------------------------|------------|---------------|------------------------|
| Apply for Permanent Housing | 2017-11-22 | Candy, Cotton | [View] [Edit] [Delete] |
| Temporary Housing Obtained | 2017-11-27 | Candy, Cotton | [View] [Edit] [Delete] |
| Housing Obtained/Found | 2018-01-16 | Candy, Cotton | [View] [Edit] [Delete] |
| Client Moved In | 2018-02-03 | Candy, Cotton | [View] [Edit] [Delete] |

Buttons: Add Session, View All Session Details, Add a new Case Session, Display this Case Session, Edit this Case Session, Delete this Case Session, Display all Case Sessions.

Display

1. Click on the **VIEW ALL SESSION DETAILS** button

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



Sessions - Wonderland, Alice



Goal Housing Placement
Caseworker Candy, Cotton
Service Provider Demo Organization
Status Open
Factor Housing - Loss of
Family N/A
Start Date and Time 2017-11-22
Target Date N/A
End Date and Time 2018-08-16
Total Elapsed Time 05: 30 Hrs
Total Expended Time 267 Days

Sessions

| Activity | Description | Date | Expended Time | Service Provider | Caseworker | Responsibility | Agency Involved / Referral | Client Present | Family Present |
|-----------------------------|---|------------|---------------------------------------|-------------------|---------------|----------------|----------------------------|----------------|----------------|
| Apply for Permanent Housing | Completed application for social housing registry | 2017-11-22 | 0 Expended Hours, 30 Expended Minutes | Demo Organization | Candy, Cotton | | Housing Services | Yes | No |
| Temporary Housing Obtained | Client is moving in with cousin temporarily. | 2017-11-27 | 2 Expended Hours, 0 Expended Minutes | Demo Organization | Candy, Cotton | Client | | Yes | No |
| Housing Obtained/Found | Social housing became available. | 2018-01-16 | 0 Expended Hours, 0 Expended Minutes | Demo Organization | Candy, Cotton | Client | Housing Services | No | No |
| Client Moved In | | 2018-02-03 | 3 Expended Hours, 0 Expended Minutes | Demo Organization | Candy, Cotton | Client | | Yes | Yes |

✕ Cancel

How To: Edit a Session

Edit a Case

See [Edit a Case \(on page 12\)](#)

Go to the Sessions Tab

1. Click on the **SESSIONS** tab

You're now on the **Sessions** tab

Details **Sessions** Documents Case Comments

Filter by text
Filter items

Show 10 entries

| Activity | Date | Caseworker | Action |
|-----------------------------|------------|---------------|--------|
| Apply for Permanent Housing | 2017-11-22 | Candy, Cotton | |
| Temporary Housing Obtained | 2017-11-27 | Candy, Cotton | |
| Housing Obtained/Found | 2018-01-16 | Candy, Cotton | |
| Client Moved In | 2018-02-03 | Candy, Cotton | |

Add a new Case Session
+ Add Session View All Session Details

Display all Case Sessions

Display this Case Session
Edit this Case Session
Delete this Case Session

1

Edit a Record

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

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

How To: Add a Session Appointment

Edit a Session

See [Edit a Session \(on the previous page\)](#)

Go to the [Session Appointments Tab](#)

1. Click on the **APPOINTMENTS** tab

You're now on the **Appointments** tab

Client - Edit Case Session

Details **Appointments** Comments

Filter by text
Filter items

Show 10 entries

| Appointment Date | Appointment Time | Description | Action |
|------------------|------------------|-------------|--------|
| 2018-08-16 | 9:22 AM | Follow-up | |

Add a new Appointment

Add Appointment

Display this Appointment

Edit this Appointment

Delete this Appointment

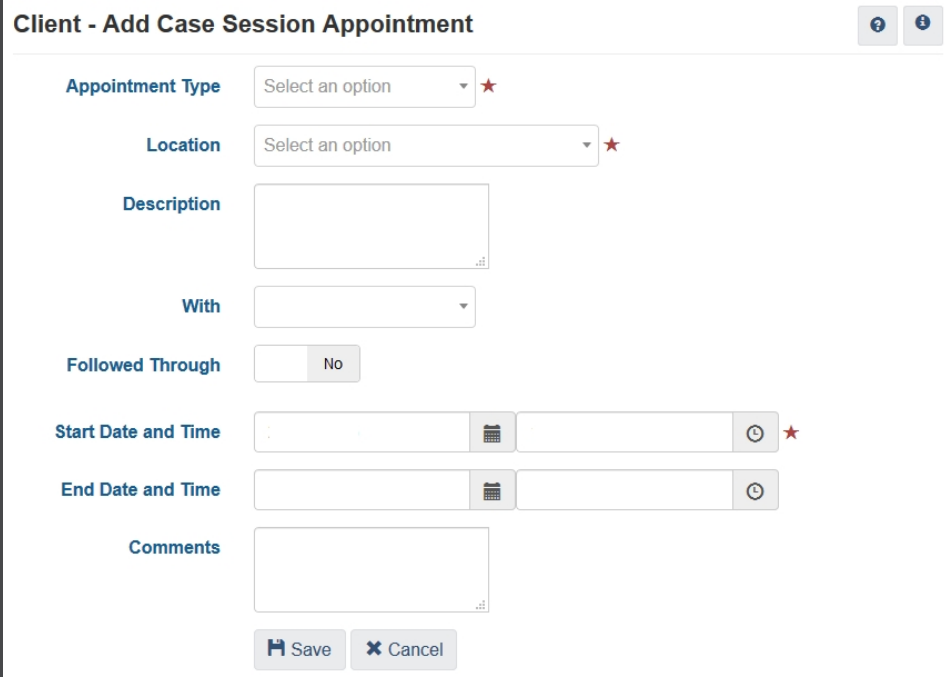
1

Add a Case Session Appointment

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

Now you're on the **Client - Add Case Session Appointment** Screen

County of Simcoe
Training Manual



The screenshot shows a web form titled "Client - Add Case Session Appointment". The form has the following fields and controls:

- Appointment Type:** A dropdown menu with "Select an option" and a red star icon.
- Location:** A dropdown menu with "Select an option" and a red star icon.
- Description:** A text input field.
- With:** A dropdown menu.
- Followed Through:** A toggle switch currently set to "No".
- Start Date and Time:** A date and time picker with a calendar icon and a clock icon, and a red star icon.
- End Date and Time:** A date and time picker with a calendar icon and a clock icon.
- Comments:** A text input field.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

2. Select the Type of the Appointment.
3. Select the Location of the Appointment.
4. Enter a brief Description of the Appointment.
5. Select who the Appointment is With.
6. Indicate whether the Client Followed Through on the Appointment.
7. Verify the Start Date and Time of the Appointment. The default value is the current date and time, but this can be changed if needed.
8. Verify the End Date and Time of the Appointment. The default value is two hours in the future from the current date and time, but this can be changed if needed.
9. Enter some additional Comments about the Appointment.
10. Click on the **SAVE** button.



Now you're on the **Client - Edit Case Session** screen on the **Appointments** tab


How To: Add Notes to an Existing Session

Edit a Session

See [Edit a Session](#) (on page 22)

Go to the [Session Comments Tab](#)

1. Click on the **COMMENTS** tab







 You're now on the **Comments** tab




Client - Edit Case Session

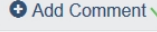
Details Appointments **Comments**

Show entries

Filter by text


| Date | User | Subject | Action |
|------------|-------|-------------------------------|--|
| 2018-08-16 | Admin | Session Notes |    |
| 2018-08-16 | Admin | Follow up with parole officer |    |

Display this Case Comment  **Edit this Case Comment**  **Delete this Case Comment** 

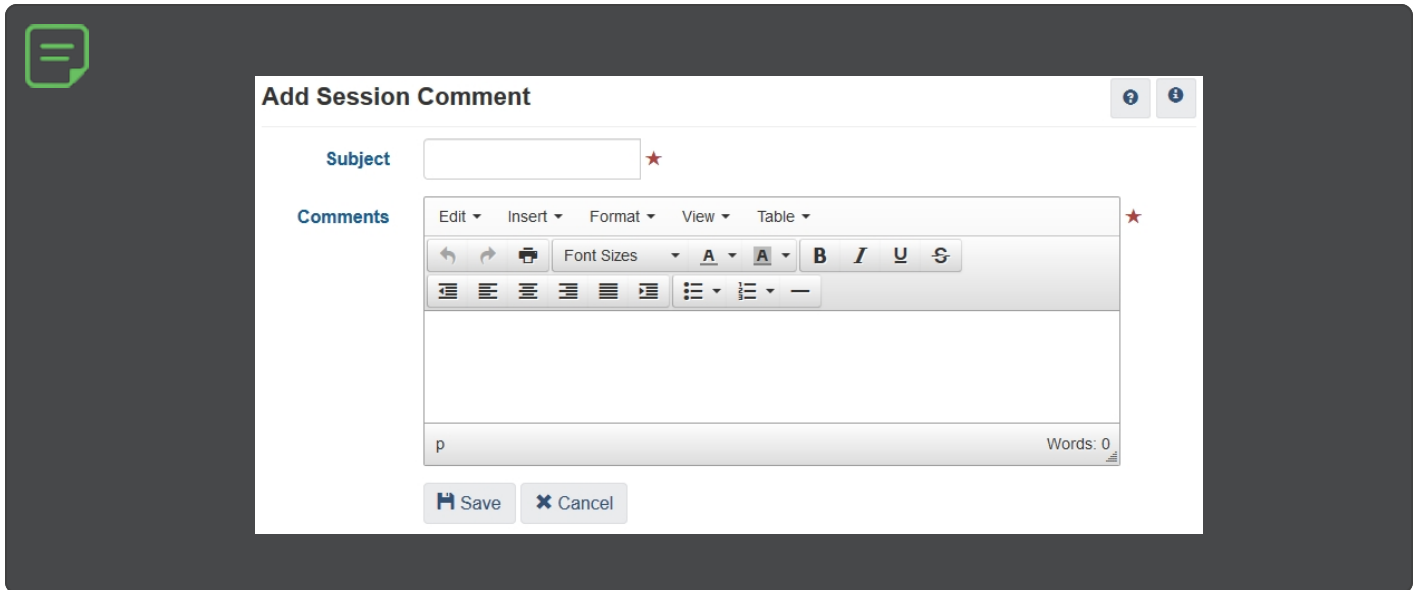
 **Add a new Case Comment**

Add a Session Comment

1. Click on **ADD COMMENT**.

 Now you're on the **Add Session Comment** screen

County of Simcoe
Training Manual



2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.


How To: Add Notes to an Existing Case


Edit a Case


See [Edit a Case \(on page 12\)](#)

Go to the [Case Comments Tab](#)

1. Click on the **CASE COMMENTS** tab

 You're now on the **Case Comments** tab



| Date | User | Subject | Action |
|------------|------------|------------------|---|
| 2016-10-25 | Ryder, Ali | Vegetarian |    |
| 2016-10-25 | Ryder, Ali | Arrest on Oct 21 |    |

Filter by text
Filter items

Show entries

Display this Case Comment

Edit this Case Comment


Delete this Case Comment

Add Comment
Add a new Case Comment

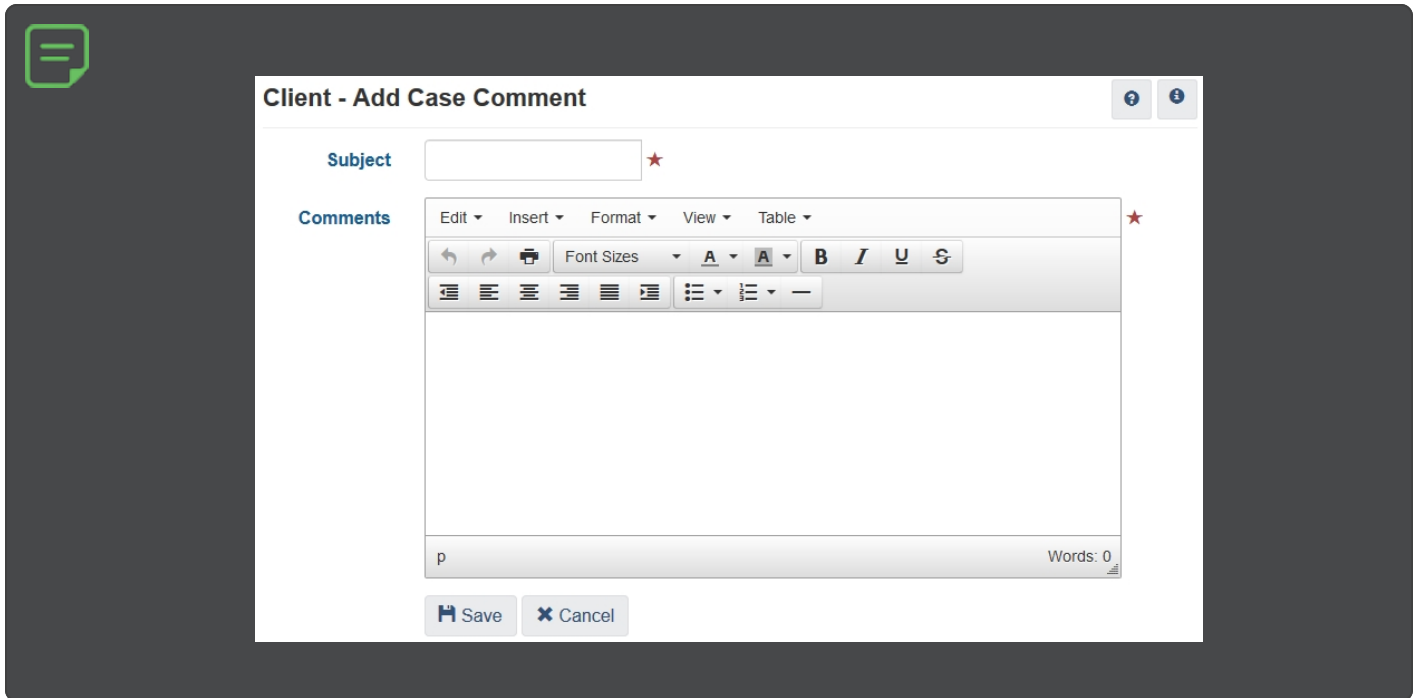
1

Add Comment

1. Click on **ADD COMMENT**.

 Now you're on the **Client - Add Case Comment** screen

County of Simcoe
Training Manual



2. Enter the Subject.
3. Enter some Comments.
4. Click the **SAVE** button.

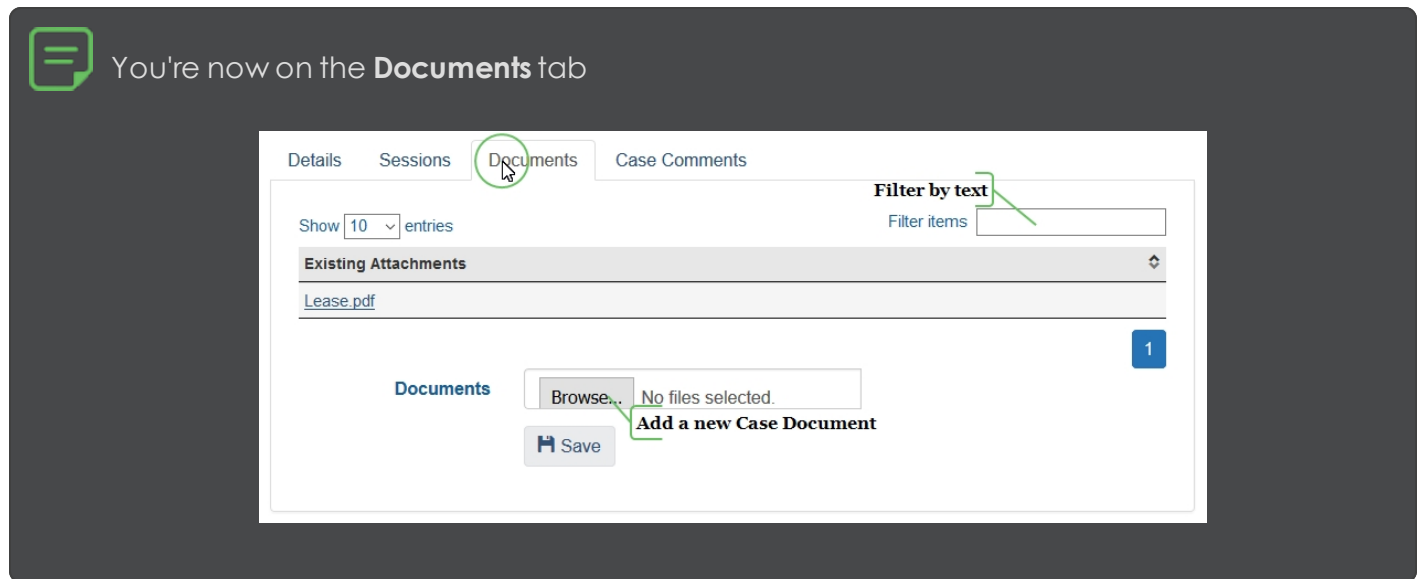
How To: Add a Document to an Existing Case

Edit a Case

See [Edit a Case \(on page 12\)](#)

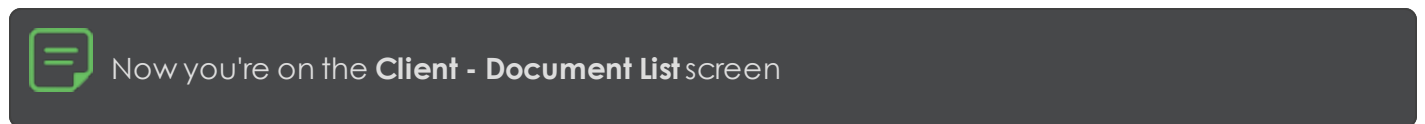
[Go to the Documents Tab](#)

1. Click on the **DOCUMENTS** tab



Add Document

1. Click **BROWSE....**
 - a. In the File Upload window, navigate to and select the file you wish to upload from your computer.
 - b. Click **OPEN**. The File Upload window will close and your file name will be listed in the Documents field.
2. Click the **SAVE** button.



CHAPTER 3: Goods and Services


Chapter Contents

| | |
|---|----|
| How To: Add an Express Good | 31 |
| How To: Add an Express Service | 33 |
| How To: Add a Goods and Services Transaction | 35 |
| How To: Manage an existing Goods and Services Transaction | 37 |
| How To: Add a Good to an Existing Goods and Services Transaction | 38 |
| How To: Add a Service to an Existing Goods and Services Transaction | 40 |
| How To: Close a Goods and Services Transaction | 42 |

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**

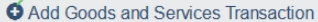
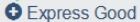
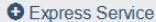
Goods and Services List


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**

Add Express Goods Transaction

Client Name(s) ★

Good ★

Program + -

Unit Of Measure ★

Unit Price

Reason for Service ★

Comments

Goods Item Info
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 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**

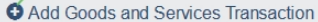
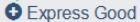
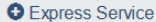
Goods and Services List


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 |    |
| 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**

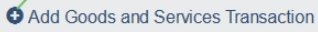
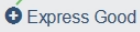
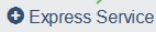
Goods and Services List

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 |    |
| 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

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 title bar with a question mark and an information icon. Below the title bar is a button labeled "Add Client". The form contains the following fields and controls:

- Client Name(s)**: A dropdown menu with a red star icon.
- Reason for Service**: A dropdown menu with the text "Select an option" and a red star icon.
- Start Date and Time**: Two input fields, the first with a calendar icon and the second with a clock icon, and a red star icon.
- 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.

At the bottom of the form are two buttons: "Save" (with a house icon) and "Cancel" (with an X icon).

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**

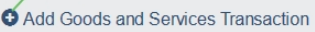
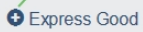

Goods and Services List

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

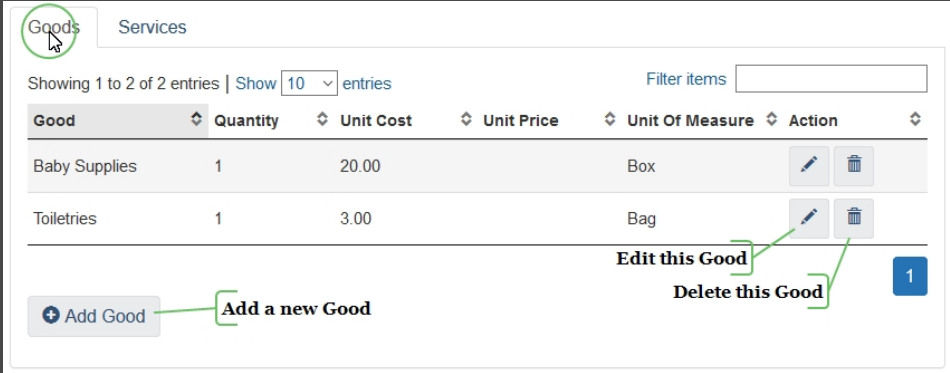
Manage a Goods and Services Transaction





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

Go to Goods Tab

1. Click on the **GOODS** tab

 Now you're on the **Goods** Tab



| Good | Quantity | Unit Cost | Unit Price | Unit Of Measure | Action |
|---------------|----------|-----------|------------|-----------------|---|
| Baby Supplies | 1 | 20.00 | | Box |   |
| Toiletries | 1 | 3.00 | | Bag |   |

Edit this Good **Delete this Good** 1

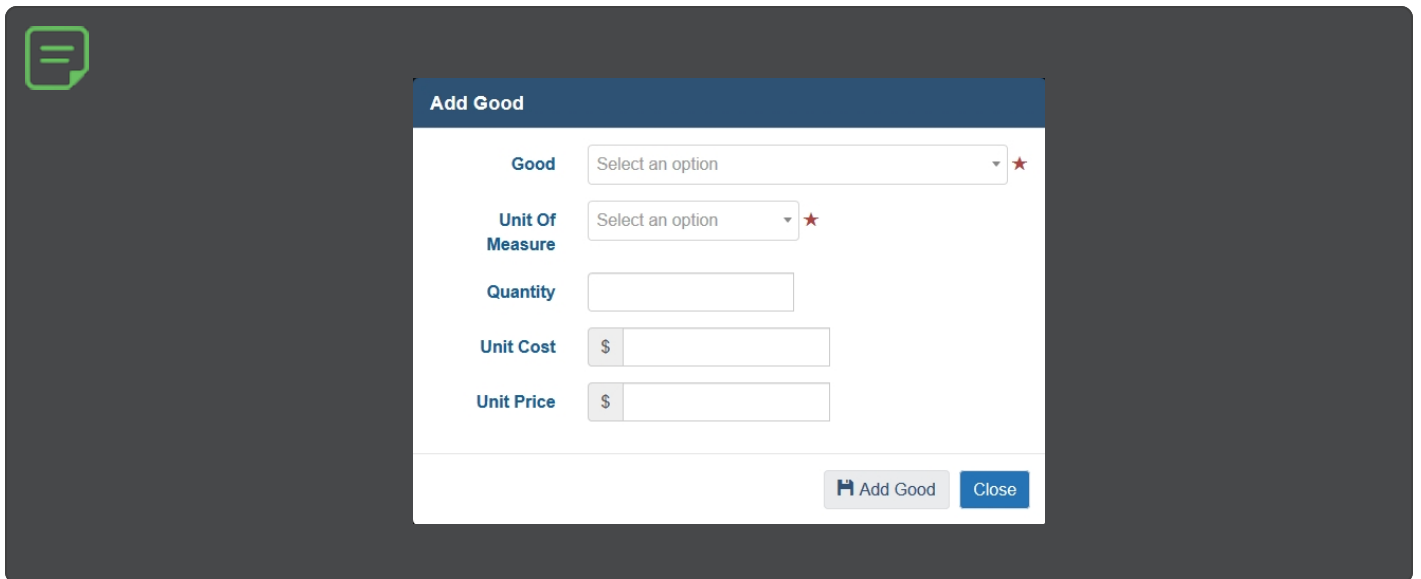
Add Good **Add a new Good**

Add a Good

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

 The **Add Good** pop-up will display

County of Simcoe
Training Manual



The screenshot shows a software interface for adding a good. The form is titled "Add Good" and is set against a dark grey background. It features a green icon in the top left corner. The form itself is white with a dark blue header. It contains the following fields:

- Good:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Unit Of Measure:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Quantity:** A text input field.
- Unit Cost:** A text input field with a "\$" symbol to its left.
- Unit Price:** A text input field with a "\$" symbol to its left.

At the bottom right of the form, there are two buttons: "Add Good" (with a save icon) and "Close".

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

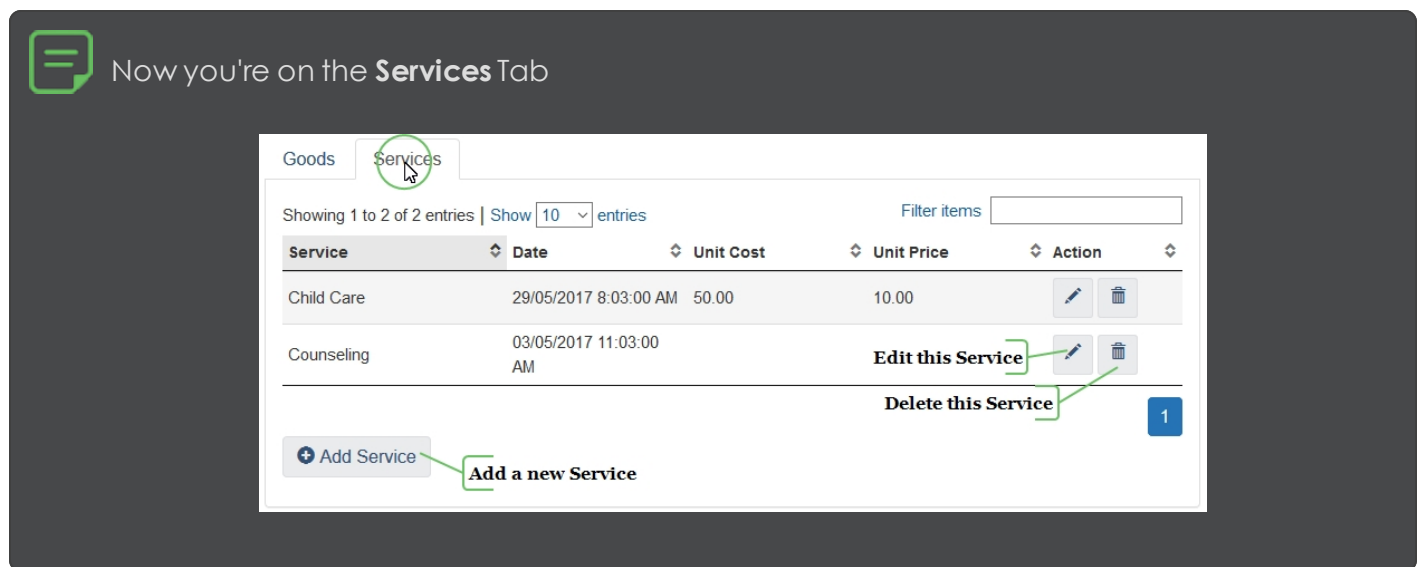
How To: Add a Service to an Existing Goods and Services Transaction

Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on page 37\)](#).

Go to [Services Tab](#)

1. Click on the **SERVICES** tab



Add a Service

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



County of Simcoe
Training Manual

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 modal contains the following fields:

- Service:** A dropdown menu with the text "Select an option" and a red star icon to its right.
- Start Date and Time:** Two input fields. The top field has a calendar icon, and the bottom field has a clock icon. A red star icon is to the right of the time field.
- End Date and Time:** Two input fields. The top field has a calendar icon, and the bottom field has a clock icon.
- Expended Hours:** A numeric input field with a spinner icon.
- Expended Minutes:** A numeric input field with a spinner icon.
- Service Cost:** A currency input field with a "\$" symbol.
- Service Price:** A currency input field with a "\$" symbol.


At the bottom right of the modal, there 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**

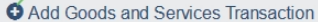
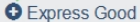
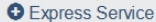
Goods and Services List


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

County of Simcoe
Training Manual

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 4: Group Activities

Group activities are used to record instances when a service was provided to a group of clients at the same time. For example, it could be used to record Alcoholics Anonymous meetings, serving meals, or job training classes.

Chapter Contents

| | |
|---|----|
| How To: Add a Group Activity | 45 |
| How To: Manage an Existing Group Activity | 47 |
| How To: Add Clients to a Group Activity as Attendees | 48 |
| How To: Mark a Single Client as Attended | 49 |
| How To: Mark All Clients as Attended | 50 |
| How To: Add Anonymous Attendees to a Group Activity | 51 |
| How To: Track Demographics of Attendees at a Group Activity | 52 |
| How To: Add Staff to a Group Activity as Organizers | 53 |
| How To: Add External Organizers to a Group Activity | 54 |
| How To: Add Comments to a Group Activity | 56 |
| How To: Duplicate a Group Activity | 57 |

How To: Add a Group Activity

Go to the Group Activity List

1. Click on the **FRONT DESK MENU**
2. Click on **GROUP ACTIVITIES**

Now you're on the **Group Activity List**

Group Activity List

Filter: All

Show 10 entries

Filter items

| Activity Name | Location | Date | Time | Attendees | Action |
|-----------------------------|--------------------|------------|----------|-----------|--------|
| Alcoholics Anonymous | | 2017-03-21 | 4:15 PM | 0 | |
| Mental Health Support Group | Service aux Jeunes | 2017-02-24 | 12:00 AM | 1 | |
| Mental Health Support Group | | 2017-03-03 | 12:00 AM | 1 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-10 | 12:00 AM | 3 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-17 | 12:00 AM | 1 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-24 | 12:00 AM | 1 | |

Add Activity

1

Add a Group Activity

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

Now you're on the **Add Group Activity** Screen

The screenshot shows a web-based form titled "Add Group Activity". The form contains the following fields and controls:

- Group Activity:** A dropdown menu with "Select an option" and a red star icon.
- Program:** A dropdown menu with "Select an option", plus and minus buttons, and a red star icon.
- Location:** A dropdown menu with "Select an option" and a downward arrow icon.
- Start Date and Time:** Two input fields with a calendar icon and a clock icon, and a red star icon.
- Expended Hours:** A spinner control.
- Expended Minutes:** A spinner control.
- Description:** A text input field.
- Reason for Service:** A dropdown menu with "Select an option" and a red star icon.
- Referred from:** A dropdown menu with "Select an option" and a downward arrow icon.
- Referred to:** A dropdown menu with "Select an option" and a downward arrow icon.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

2. Select the type of Group Activity from the drop-down list
3. Select the Program(s) for this Group Activity
4. Select the Location for this Group Activity
5. Verify the Start Date and Time. The default value is the current date and time.
6. Enter the amount of time, in hours and minutes, that this Group Activity takes
7. Enter a description of this Group Activity
8. Select the Reason for Service. This will apply to every Client participating in this Group Activity.
9. Select where Clients at this Group Activity are Referred From. This will apply to every Client participating in this Group Activity.
10. Select where Clients at this Group Activity are Referred To. This will apply to every Client participating in this Group Activity.
11. Click **SAVE** when done

How To: Manage an Existing Group Activity

Go to the Group Activity List

1. Click on the **FRONT DESK MENU**
2. Click on **GROUP ACTIVITIES**

Now you're on the **Group Activity List**

Group Activity List

Filter: All

Show 10 entries

Filter items

| Activity Name | Location | Date | Time | Attendees | Action |
|-----------------------------|--------------------|------------|----------|-----------|--------|
| Alcoholics Anonymous | | 2017-03-21 | 4:15 PM | 0 | |
| Mental Health Support Group | Service aux Jeunes | 2017-02-24 | 12:00 AM | 1 | |
| Mental Health Support Group | | 2017-03-03 | 12:00 AM | 1 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-10 | 12:00 AM | 3 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-17 | 12:00 AM | 1 | |
| Mental Health Support Group | Service aux Jeunes | 2017-03-24 | 12:00 AM | 1 | |

Add Activity

1

Manage a Record

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

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

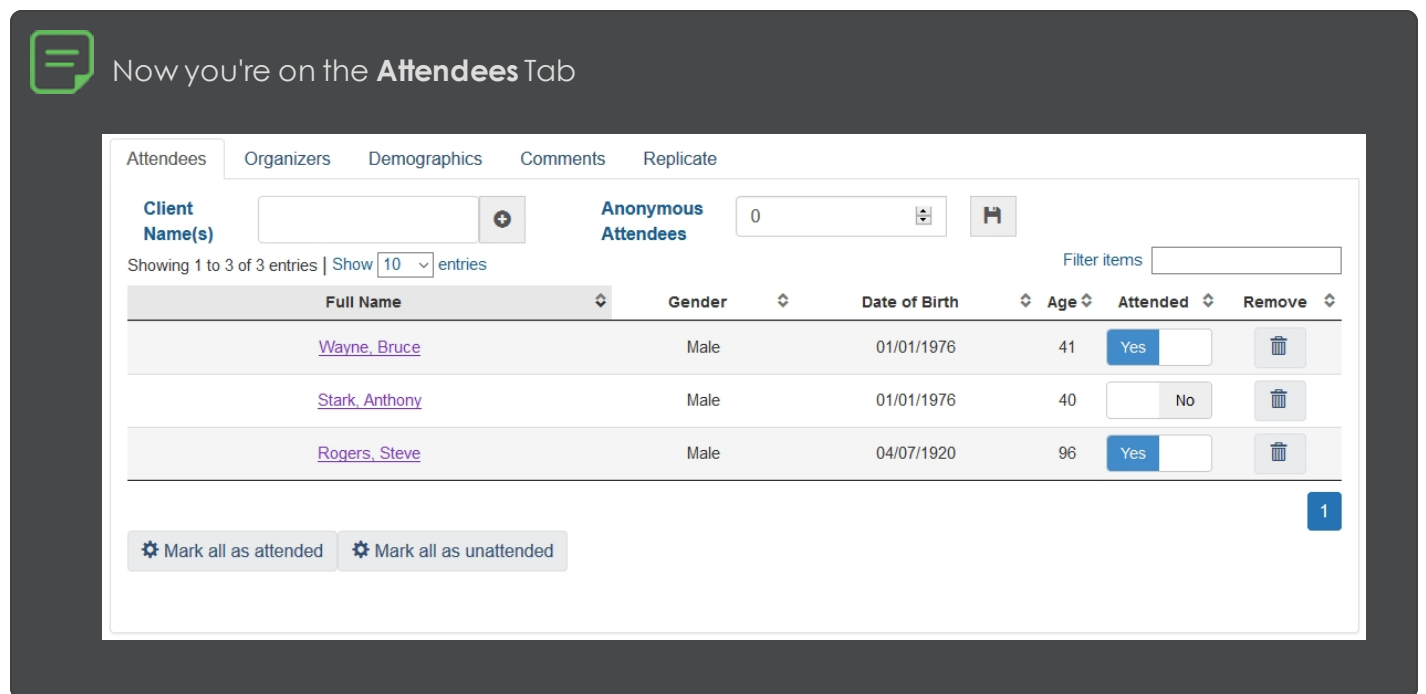
How To: Add Clients to a Group Activity as Attendees

Manage a Group Activity

See [Manage an Existing Group Activity \(on the previous page\)](#).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab



Now you're on the **Attendees** Tab


Attendees Organizers Demographics Comments Replicate

Client Name(s) + Anonymous Attendees

Showing 1 to 3 of 3 entries | Show entries Filter items

| Full Name | Gender | Date of Birth | Age | Attended | Remove |
|--------------------------------|--------|---------------|-----|---|--------|
| Wayne, Bruce | Male | 01/01/1976 | 41 | <input checked="" type="checkbox"/> Yes | |
| Stark, Anthony | Male | 01/01/1976 | 40 | <input type="checkbox"/> No | |
| Rogers, Steve | Male | 04/07/1920 | 96 | <input checked="" type="checkbox"/> Yes | |

Add Client Attendees

1. In the Client Name(s) field, select the Client(s) that you would like to add
2. Click the  button

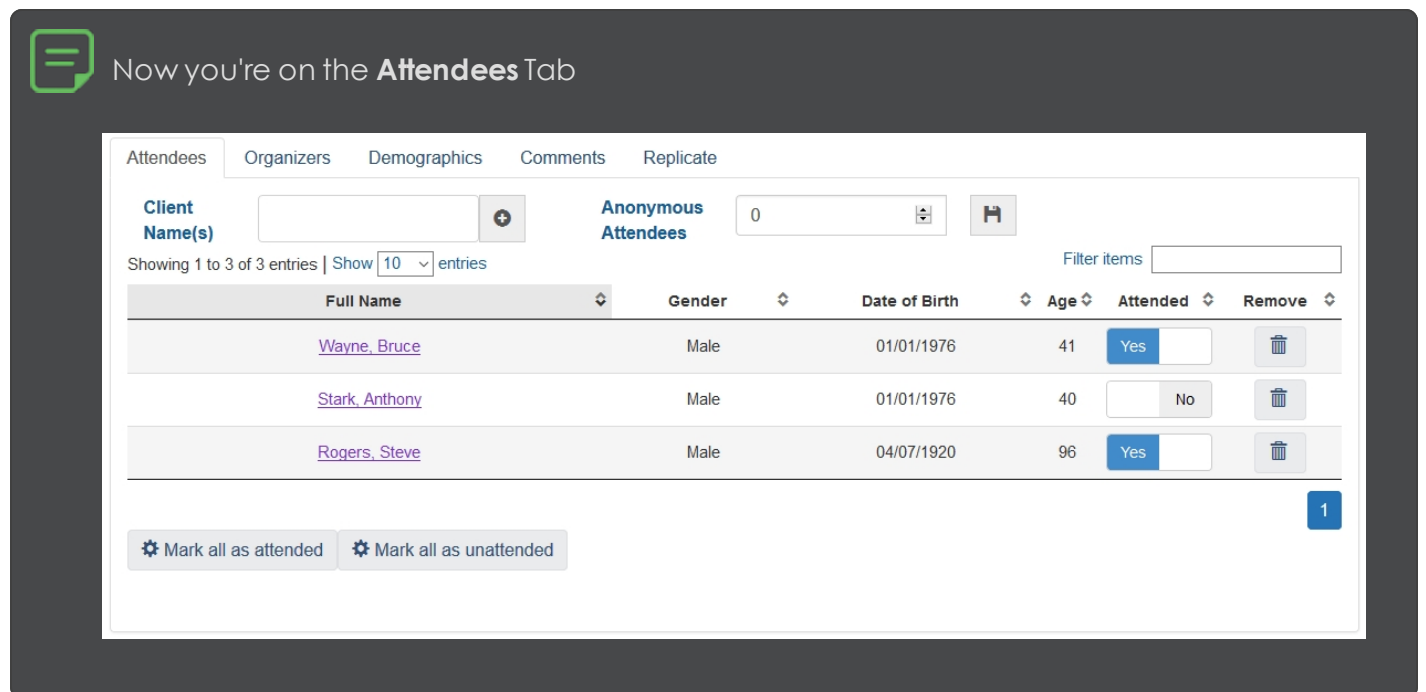
How To: Mark a Single Client as Attended

Manage a Group Activity

See [Manage an Existing Group Activity](#) (on page 47).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab



Now you're on the **Attendees** Tab

Attendees Organizers Demographics Comments Replicate

Client Name(s) + Anonymous Attendees H

Showing 1 to 3 of 3 entries | Show entries Filter items

| Full Name | Gender | Date of Birth | Age | Attended | Remove |
|--------------------------------|--------|---------------|-----|---|--------|
| Wayne, Bruce | Male | 01/01/1976 | 41 | <input checked="" type="checkbox"/> Yes | |
| Stark, Anthony | Male | 01/01/1976 | 40 | <input type="checkbox"/> No | |
| Rogers, Steve | Male | 04/07/1920 | 96 | <input checked="" type="checkbox"/> Yes | |

1

Mark a Single Client as Attended

1. Find the Client you would like to record has attended
2. Next to the Client's name, toggle the Attended field to "Yes"

How To: Mark All Clients as Attended

Manage a Group Activity

See [Manage an Existing Group Activity](#) (on page 47).

Go to Attendees Tab

1. Click on the **ATTENDEES** tab

Now you're on the **Attendees** Tab

Attendees Organizers Demographics Comments Replicate

Client Name(s) Anonymous Attendees

Showing 1 to 3 of 3 entries | Show entries Filter items

| Full Name | Gender | Date of Birth | Age | Attended | Remove |
|--------------------------------|--------|---------------|-----|---|---------------------------------------|
| Wayne, Bruce | Male | 01/01/1976 | 41 | <input checked="" type="checkbox"/> Yes | <input type="button" value="Remove"/> |
| Stark, Anthony | Male | 01/01/1976 | 40 | <input type="checkbox"/> No | <input type="button" value="Remove"/> |
| Rogers, Steve | Male | 04/07/1920 | 96 | <input checked="" type="checkbox"/> Yes | <input type="button" value="Remove"/> |

1

Mark all Clients as Attended

1. Click the **MARK ALL AS ATTENDED** button

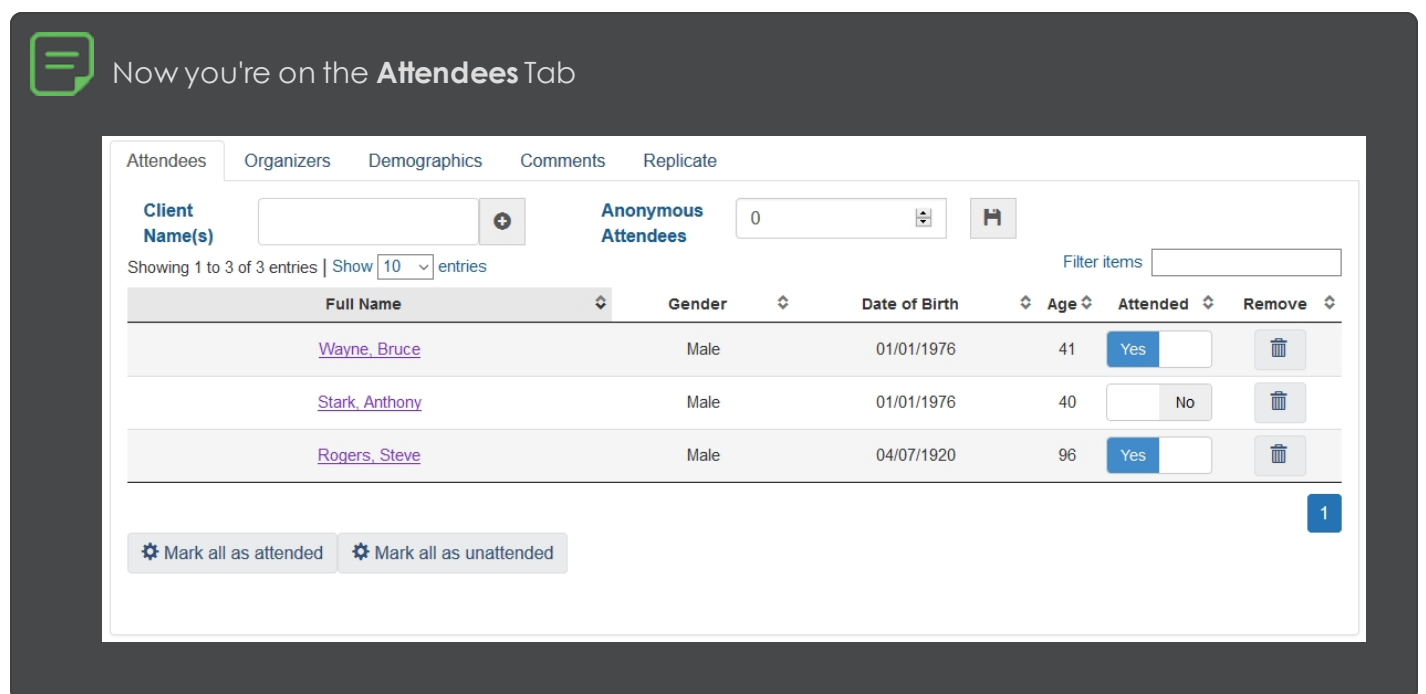
How To: Add Anonymous Attendees to a Group Activity

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).


Go to Attendees Tab

1. Click on the **ATTENDEES** tab






Now you're on the **Attendees** Tab

Attendees Organizers Demographics Comments Replicate


Client Name(s) + Anonymous Attendees 

Showing 1 to 3 of 3 entries | Show entries Filter items

| Full Name | Gender | Date of Birth | Age | Attended | Remove |
|--------------------------------|--------|---------------|-----|---|---|
| Wayne, Bruce | Male | 01/01/1976 | 41 | <input checked="" type="checkbox"/> Yes |  |
| Stark, Anthony | Male | 01/01/1976 | 40 | <input type="checkbox"/> No |  |
| Rogers, Steve | Male | 04/07/1920 | 96 | <input checked="" type="checkbox"/> Yes |  |

1

Add Anonymous Attendees

1. In the Anonymous Attendees field, enter the number of non-Client attendees you had
2. Click the  button

How To: Track Demographics of Attendees at a Group Activity

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).

Go to Demographics Tab

1. Click on the **DEMOGRAPHICS** tab

Now you're on the **Demographics** Tab

| | Client | Anonymous | Total | | Client | Anonymous | Total |
|----------------|--------|-----------|-------|--------------|--------|-----------|-------|
| Youth | 1 | 2 | 3 | Females | 0 | 0 | 0 |
| Adults | 3 | 3 | 6 | Males | 5 | 6 | 11 |
| Seniors | 1 | 1 | 2 | Other | 0 | 0 | 0 |
| Unknown | 0 | 0 | 0 | Unknown | 0 | 0 | 0 |
| Aboriginal | 2 | 3 | 5 | Disabled | 0 | 1 | 1 |
| Non-Aboriginal | 3 | 2 | 5 | Non-Disabled | 5 | 5 | 10 |
| Unknown | 0 | 1 | 1 | Unknown | 0 | 0 | 0 |

Save Save values

Track Demographics

1. In the Anonymous column, type in the number of Youth, Adults, and Seniors that attended the event
2. In the Anonymous column, type in the number of Females, Males, and Other people that attended the event
3. In the Anonymous column, type in the number of Aboriginal and Non-Aboriginal people that attended the event
4. In the Anonymous column, type in the number of Disabled and Non-Disabled people that attended the event
5. Click **SAVE** when done

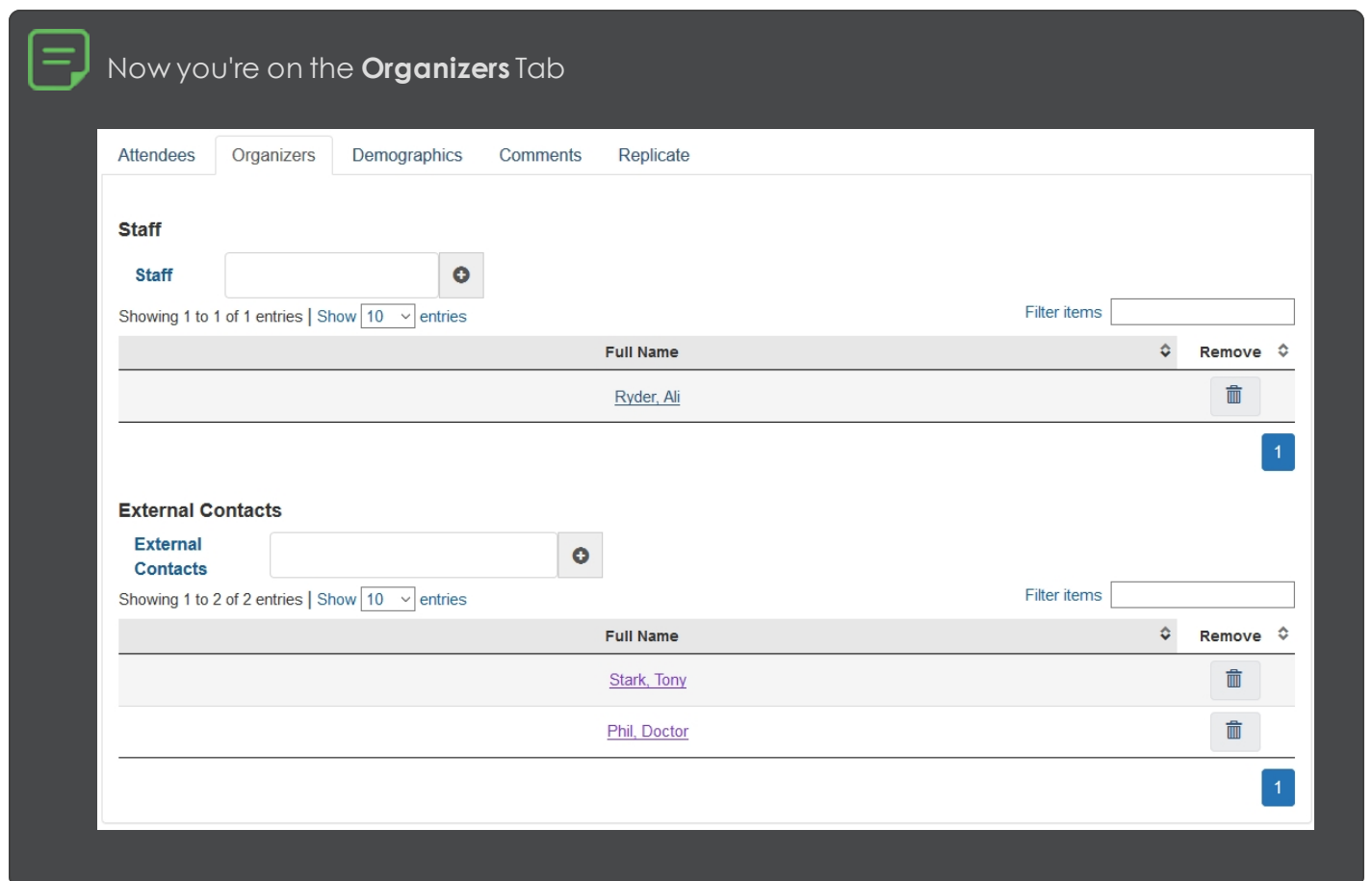
How To: Add Staff to a Group Activity as Organizers

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).

Go to Organizers Tab

1. Click on the **ORGANIZERS** tab



Add Staff to the Group Activity

1. In the Staff field, select the Staff that you would like to add
2. Click the  button

How To: Add External Organizers to a Group Activity



In order to add an External Contact, they must first exist in the **People List**. If they don't already, you must first [Add a Person \(on page 1\)](#) before you can add them as an External Contact.

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).

Go to Organizers Tab

1. Click on the **ORGANIZERS** tab

Now you're on the **Organizers** Tab

Attendees | **Organizers** | Demographics | Comments | Replicate

Staff

Staff +

Showing 1 to 1 of 1 entries | Show 10 entries | Filter items

| Full Name | Remove |
|----------------------------|--------|
| Ryder, Ali | |

1

External Contacts

External Contacts +

Showing 1 to 2 of 2 entries | Show 10 entries | Filter items

| Full Name | Remove |
|------------------------------|--------|
| Stark, Tony | |
| Phil, Doctor | |

1

Add External Contacts to the Group Activity

1. In the External Contacts field, select the External Contacts that you would like to add
2. Click the  button

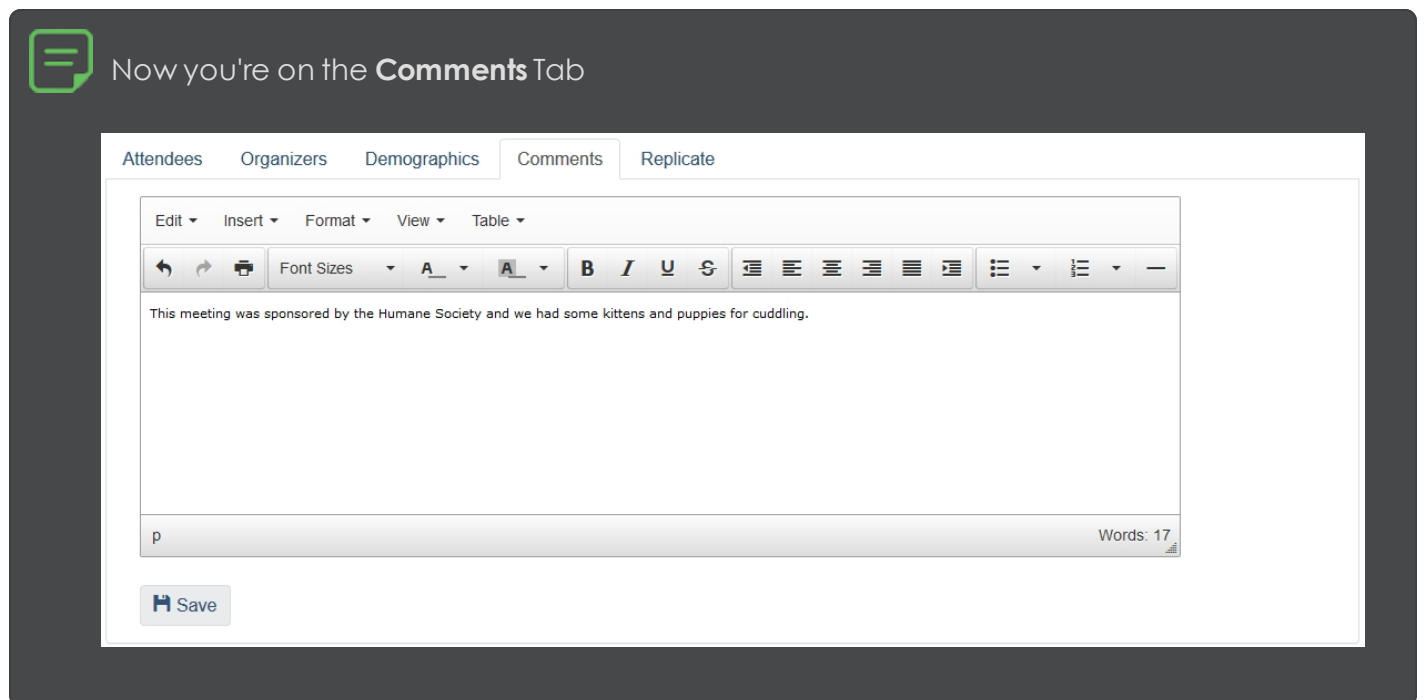
How To: Add Comments to a Group Activity

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).

Go to Comments Tab

1. Click on the **COMMENTS** tab



Add Comment

1. Enter some Comments
2. Click **SAVE** when done

How To: Duplicate a Group Activity

Manage a Group Activity

See [Manage an Existing Group Activity \(on page 47\)](#).

[Go to Replicate Tab](#)

1. Click on the **REPLICATE** tab

Now you're on the **Replicate** Tab

Attendees Organizers Demographics Comments **Replicate**

Keep Attendees

Keep Organizers

« **June 2017**

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 28 | 29 | 30 | 31 | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |

Dates

07/06/2017
14/06/2017
21/06/2017
28/06/2017

Replicate Group Activity

1. Indicate whether you would like to duplicate the list of Attendees for this Group Activity
2. Indicate whether you would like to duplicate the list of Organizers for this Group Activity
3. In the Dates field, click on the date(s) you would like to run the Group Activity on
4. Click the **REPLICATE** button

CHAPTER 5: Assessments

Chapter Contents

| | |
|-----------------------------------|----|
| How To: Add a VI-SPDAT | 59 |
| How To: Add a SPDAT | 62 |
| How To: Complete New Survey | 65 |

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**

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 | [Edit] [View] [Delete] |
| Allen, Barry | 2017-01-05 07:55 AM | LeBlanc, Miguel | Adult | 1 | | [Edit] [View] [Delete] |
| Doe, Johnny | 2017-03-03 12:58 PM | Abbott, Jason | Adult | 1 | 11 | [Edit] [View] [Delete] |
| Kent, Darren | 2016-10-20 10:33 AM | Abouanni, Charbel | Adult | 2 | 13 | [Edit] [View] [Delete] |
| Kent, Darren | 2017-02-15 05:00 PM | Fulford, Darren | Adult | 1 | 9 | [Edit] [View] [Delete] |

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

The screenshot shows a form titled "New VI-SPDAT Version 2 Intake" with a dropdown menu for "VI-SPDAT Type" highlighted by a purple callout box. The form includes fields for Client Name, Caseworker, Start Date and Time, Pre-Screen Period, Consent, Program, and Description. Below these fields is a section titled "History of Housing and Homelessness" with a table containing columns for #, Question, Answer, and Refused. A purple callout box highlights the "Questions of the VI-SPDAT type selected" section within the table. At the bottom of the form are "Save" and "Cancel" buttons.

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?

Training Manual

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

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

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

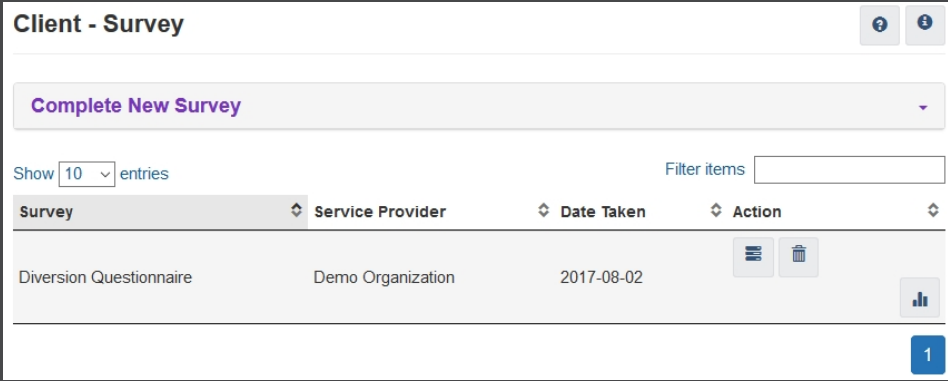
Open a Client File

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

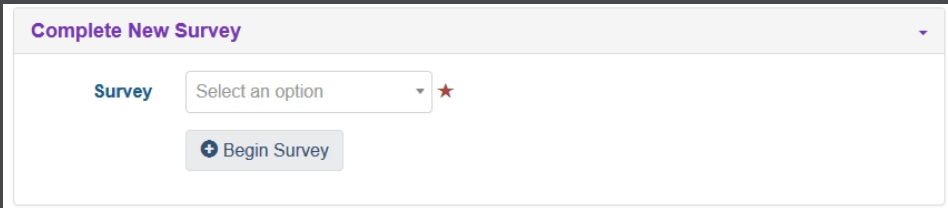


The screenshot shows the 'Client - Survey' interface. At the top, there is a 'Complete New Survey' button. Below it, there is a 'Show 10 entries' dropdown and a 'Filter items' search box. A table lists survey entries with columns for 'Survey', 'Service Provider', 'Date Taken', and 'Action'. The first entry is 'Diversion Questionnaire' by 'Demo Organization' on '2017-08-02'. There are icons for menu and delete in the 'Action' column. A blue box with the number '1' is in the bottom right corner.

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 'Survey' label next to a dropdown menu that currently displays 'Select an option' with a red star icon to its right. Below the dropdown is a button labeled '+ Begin Survey'.

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

County of Simcoe
Training Manual



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

Take Survey

Name of Survey
Best Survey Ever!

Date Taken ★

Filter items

| # | Question | Response |
|---|---------------------------------------|----------------------|
| 1 | What's the client's favourite colour? | Select an option |
| 2 | How many pets does the client have? | <input type="text"/> |

Save **Cancel**

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 6:

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.


Chapter Contents

| | |
|--|----|
| How To: See who is on a Waiting List | 68 |
| How To: See what Waiting List(s) a Client is on | 70 |
| How To: Add a Client to a Waiting List | 71 |
| How To: Change a Client's Status on a Waiting List | 73 |
| How To: Remove a Client from a Waiting List | 75 |

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

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 ✕ Cancel Return to Waiting Lists

1


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

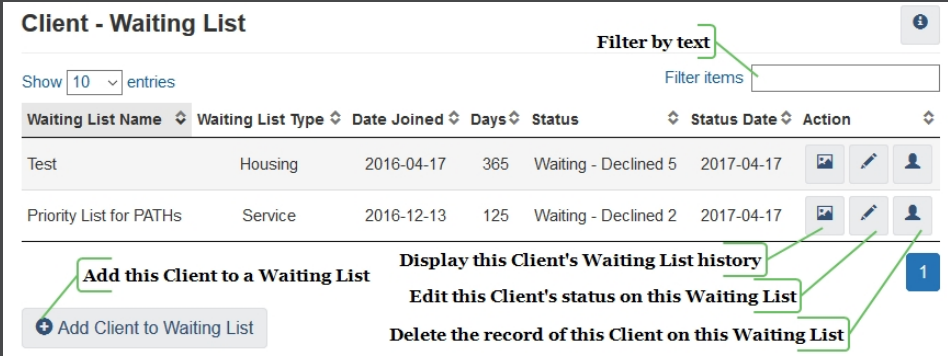
Open a Client File

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 and three callout boxes: 'Add this Client to a Waiting List' pointing to the button, 'Display this Client's Waiting List history' pointing to the history icon, 'Edit this Client's status on this Waiting List' pointing to the edit icon, and 'Delete the record of this Client on this Waiting List' pointing to the delete icon. A blue notification badge with the number '1' is visible in the bottom right corner of the table area.

| 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

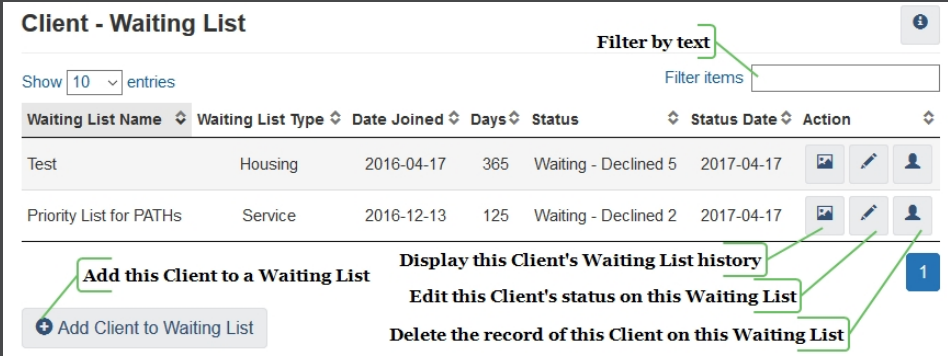
Open a Client File

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 right, there is a 'Filter by text' field. Below it, a 'Show 10 entries' dropdown and a 'Filter items' search box are visible. 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 rows: '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, there is an 'Add Client to Waiting List' button. To the right of the table, there are three callouts: 'Display this Client's Waiting List history' pointing to a magnifying glass icon, 'Edit this Client's status on this Waiting List' pointing to a pencil icon, and 'Delete the record of this Client on this Waiting List' pointing to a person icon. A blue notification badge with the number '1' is located in the bottom right corner of the table area.

| 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 |    |

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 ★

Client Name ★

Start Date ★

End Date

Priority ★

Reason for Being on List ★

Status on Waiting List ★

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.
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

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 × 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