

County of Simcoe
Training Manual

Training Manual

Shelter Worker
County of Simcoe

Prepared by
ACRE Consulting

2018-12-21



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CHAPTER 2:

Admissions

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How To: See who is Currently Booked In at your Service Provider

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Booked In Tab

1. Click on the **BOOKED IN** Tab



Now you're on the **Booked In** Tab

Admissions

Booked In | Reservations | Bed Availability

Showing 1 to 3 of 3 entries | Show 10 entries

Filter by text

Full Name	Date	Reason for Service	Room : Bed	Action
Allen, Barry	2017-01-12 06:50 AM	Housing - Eviction by Other	Chambre 101 : Bed 1	
Trump, Don	2016-12-08 12:00 AM	Housing - Eviction by Other	Chambre 101 : Bed 6	
Wayne, Bruce	2017-01-18 08:42 AM	Housing - Eviction by Landlord	Chambre 202 : Bed 3	


Add a new Book In **Add a new Express Book In** **Book Out this Client**

Manage Rooms and Beds **Edit this Stay** **Display this Stay**

How To: Add a Book In

Go to the Admissions List


1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**

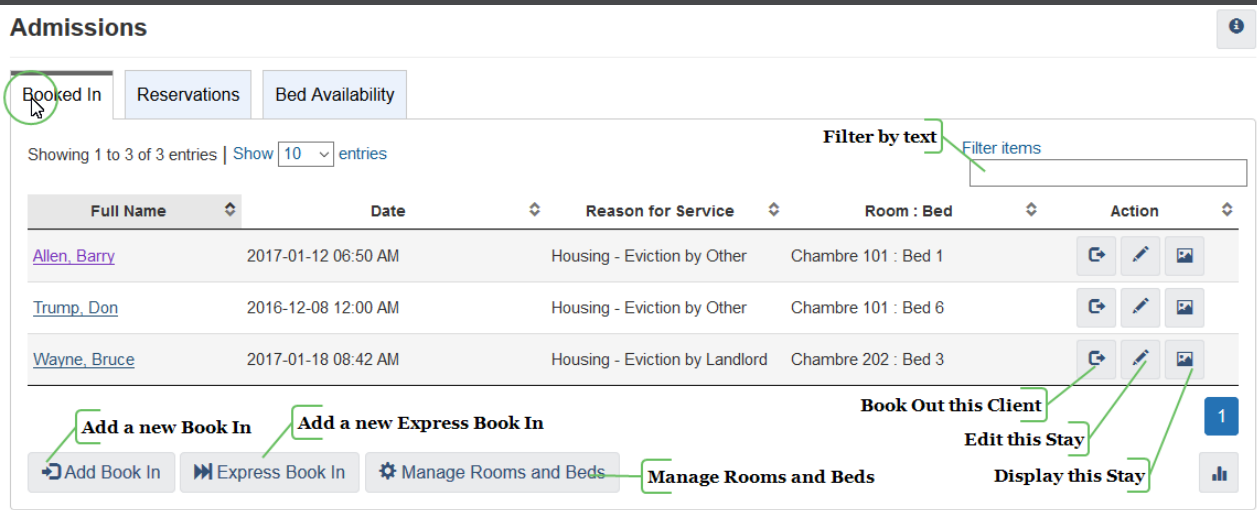
 Now you're on the **Admissions List**

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

Go to the Booked In Tab

1. Click on the **BOOKED IN** Tab

 Now you're on the **Booked In** Tab












Admissions

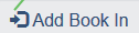
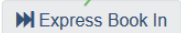
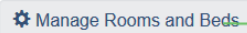
Booked In | Reservations | Bed Availability

Showing 1 to 3 of 3 entries | Show 10 entries

Filter by text

Full Name	Date	Reason for Service	Room : Bed	Action
Allen, Barry	2017-01-12 06:50 AM	Housing - Eviction by Other	Chambre 101 : Bed 1	  
Trump, Don	2016-12-08 12:00 AM	Housing - Eviction by Other	Chambre 101 : Bed 6	  
Wayne, Bruce	2017-01-18 08:42 AM	Housing - Eviction by Landlord	Chambre 202 : Bed 3	  

Add a new Book In **Add a new Express Book In**

   **Manage Rooms and Beds**

Book Out this Client **Edit this Stay** **Display this Stay**

Add a Book-In

1. Click on the **ADD BOOK IN** button.

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Now you're on the **Add Book In** Screen


2. Select client(s). If you arrived from this screen from the **Client - Admissions** List, the client has already been selected.

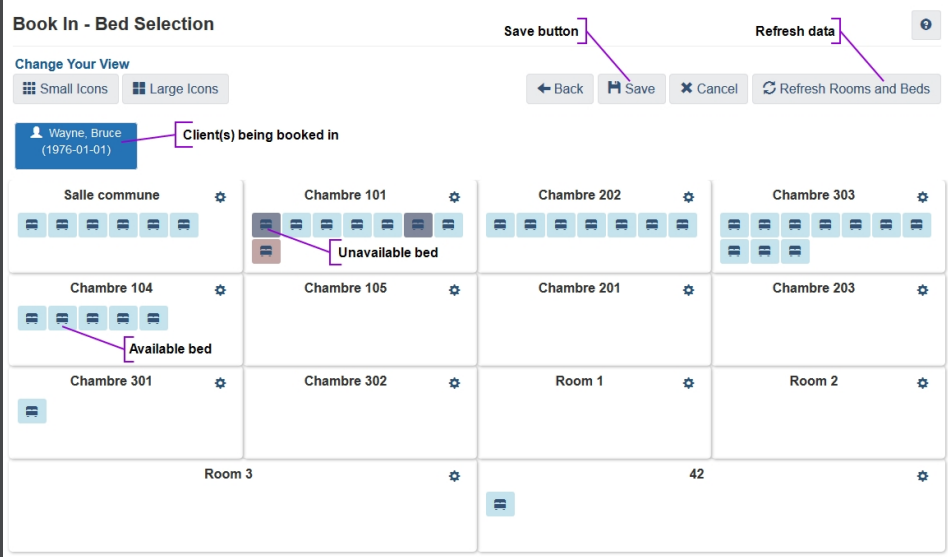


If the client is part of a family, once you select the first family member, a button will appear with the label **Book In Family**. If you click on it, it will automatically add all family members to this book-in record.

3. Verify the Start Date and Time. The default value is the current date and time.
4. Enter the date when is the client expected to leave


5. Select the reason they are seeking a bed
6. Select the program(s) for this stay
7. Select the organization that referred the client to you
8. Enter the name of the person that referred the client to you
9. If the client is allowed out past curfew, enter the time they can stay out until
10. If the client requires a morning wake-up, enter the wake-up time
11. Indicate whether the client was intoxicated at the time of intake
12. Record additional notes about this book-in
13. When done, click **NEXT** to select a bed

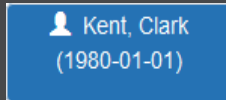
 Now you're on the **Bed Selection** Screen



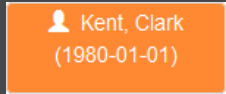
Select a Bed

1. Your client(s) will display in blue boxes at the top left

 Clients are displayed in the top left, in boxes that contain the client's name and date of birth. In order to assign a client to a bed, click on the client's box to select it, then click on the desired bed.



When the Client box is blue, it is unselected.



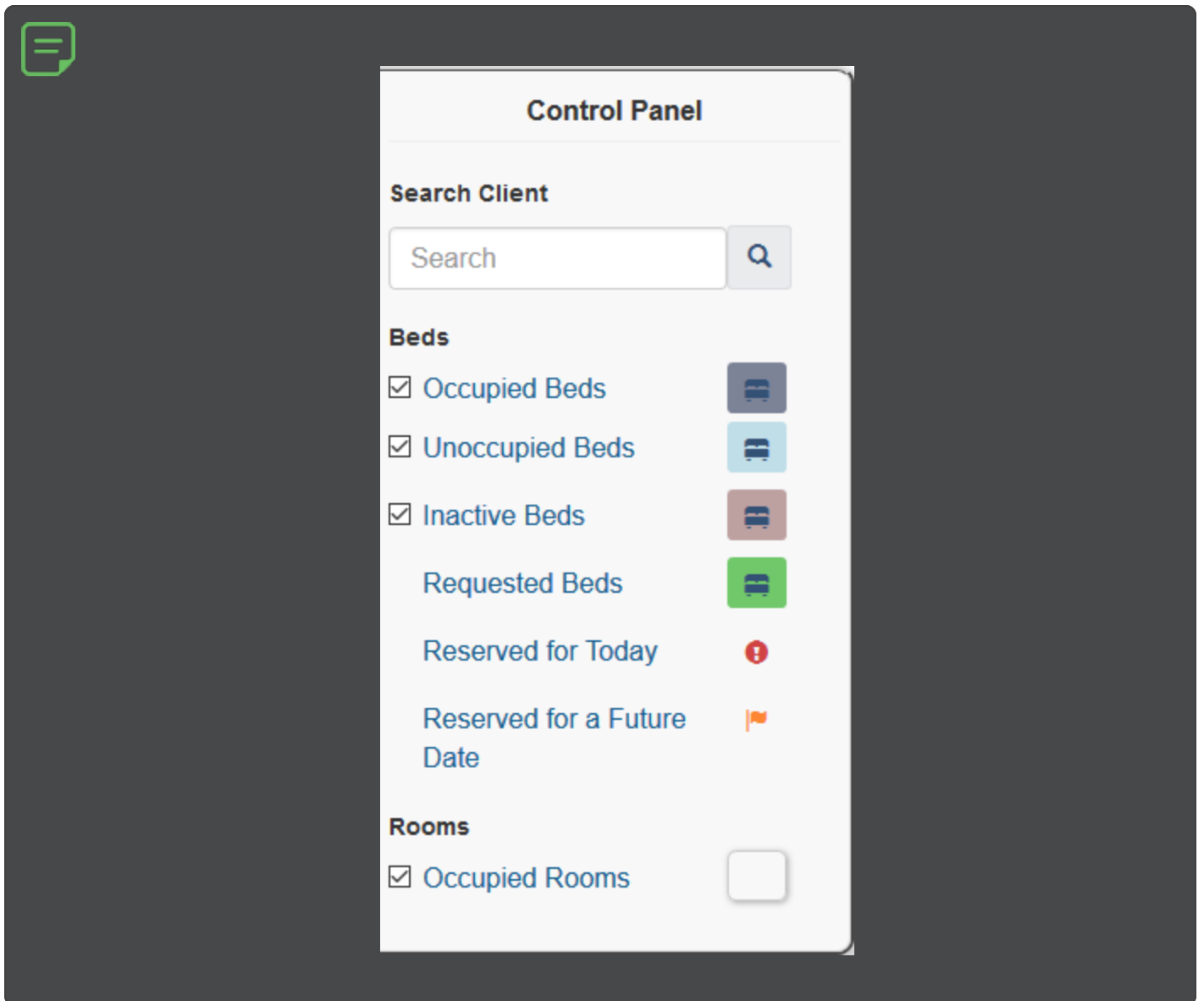
When the Client box is orange, it is selected.

2. Click on a client's blue box, then click on the light blue bed you would like to place them in
3. The bed should turn green



A Control Panel can be visible if the mouse is moved over the left side of the screen, that indicates what the icons mean.

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4. Repeat this for every client you selected
5. When done, click the **SAVE** button



Now you're on the **Admissions List**

How To: Book Out a Client

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**



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

Go to the Booked In Tab

1. Click on the **BOOKED IN** Tab



Now you're on the **Booked In** Tab

Admissions

Booked In | Reservations | Bed Availability

Showing 1 to 3 of 3 entries | Show 10 entries

Filter by text

Full Name	Date	Reason for Service	Room : Bed	Action
Allen, Barry	2017-01-12 06:50 AM	Housing - Eviction by Other	Chambre 101 : Bed 1	
Trump, Don	2016-12-08 12:00 AM	Housing - Eviction by Other	Chambre 101 : Bed 6	
Wayne, Bruce	2017-01-18 08:42 AM	Housing - Eviction by Landlord	Chambre 202 : Bed 3	

Add a new Book In **Add a new Express Book In**

Manage Rooms and Beds

Book Out this Client **Edit this Stay** **Display this Stay**

Book-Out Client

1. Click on the button for your client's stay

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Now you're on the **Book Out** Screen

Book Out ? !

Service Provider House of Hope

Room Chambre 101

Bed Bed 1

Start Date and Time 2017-01-12 6:50 AM

Reason for Service Housing - Eviction by Other

Book Out Date and Time ★

Reason for Discharge ★

Referred to

Comments

2. Confirm Book Out Date and Time (default is now)
3. Select the Reason for Discharge
4. Optionally, record if they were referred to another agency upon book-out
5. Optionally, record additional notes about this stay or book-out
6. When done, click **BOOK OUT**, or click **CANCEL** to scrap




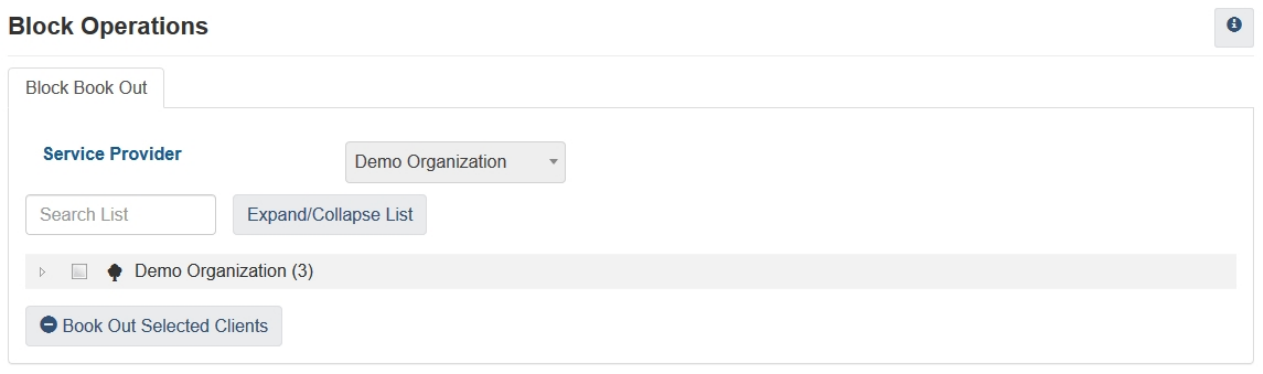
Now you're on the **Client - Admission List**

How To: Book Out All Clients

Go to the Block Operations Screen

1. Click on the **FRONT DESK MENU**
2. Click on **BLOCK OPERATIONS**

 Now you're on the **Block Operations** screen



Block Operations

Block Book Out

Service Provider Demo Organization


Search List Expand/Collapse List


▶ Demo Organization (3)

Book Out Selected Clients

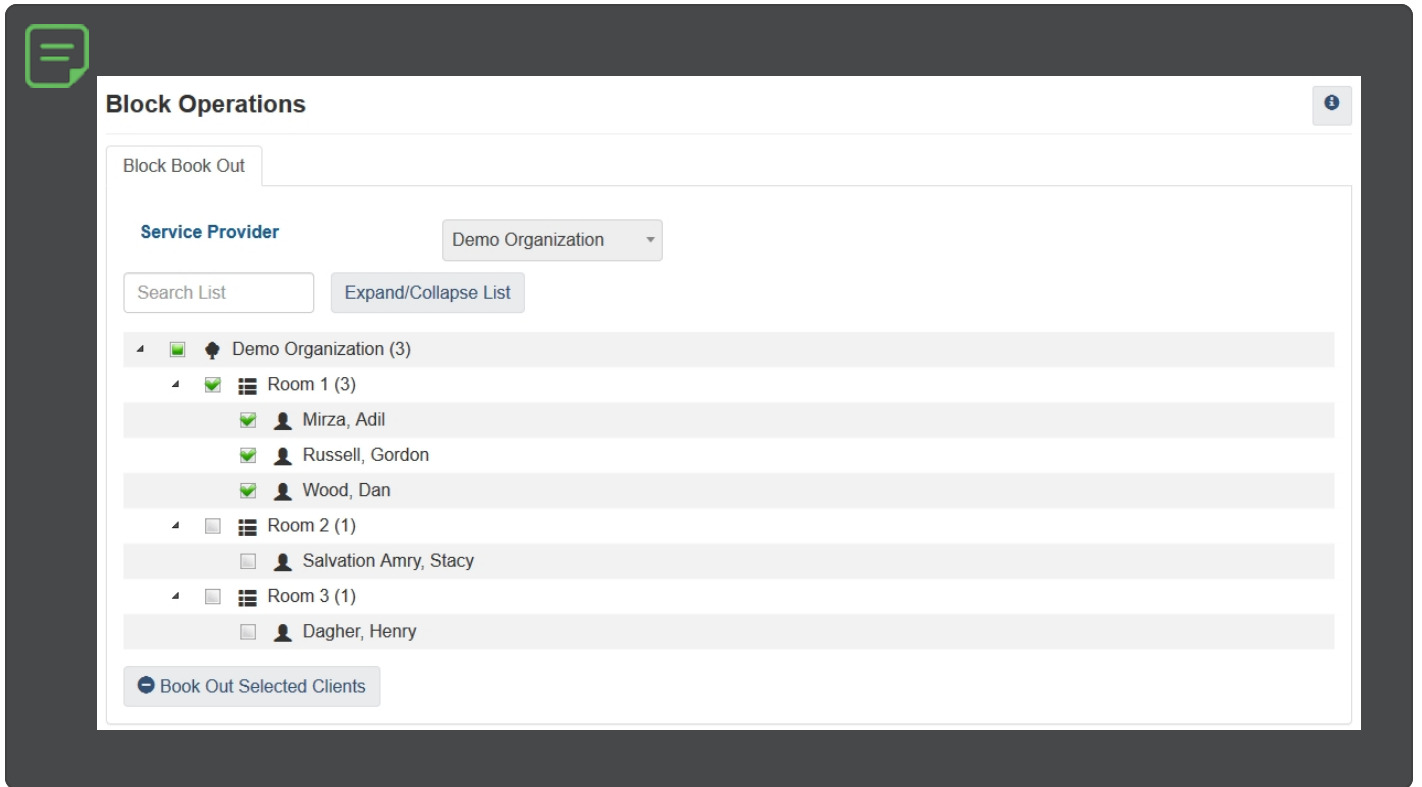
Book-Out Client

1. Click on the **EXPAND/COLLAPSE LIST** button
2. Check the boxes next to the Client(s) you wish to Book Out at the same time

 You can check the box next to a Room name to Book Out all Clients in that Room, or the box next to a Service Provider to Book Out all Clients at that Service Provider

 The Clients with a green check mark in the box next to their name will be Booked Out

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3. When done, click **BOOK OUT SELECTED CLIENTS**

How To: Add a Reservation



This Function is almost identical to [Add a Book In \(on page 6\)](#), except that the Stay doesn't activate when the Reservation is created, it has to be manually converted into a Book In later.

Open a Client File

See [Open a Client File \(on page 1\)](#)

[Go to the Client Admissions List](#)

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



Now you're on the

[Go to the Reservations Tab](#)

1. Click on the



Now you're on the

[Add a Reservation](#)

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



Now you're on the

2. Select client(s). If you arrived from this screen from the , the client has already been selected.
3. Enter the date and time that the reservation was made(default is now)
4. Optional: when is the client expected to leave?
5. Enter the reason they are seeking a bed
6. Optional: enter the program for this stay
7. Optional: where were they referred from?
8. Optional: who were they referred by?

9. Optional: record additional notes about this reservation
10. When done, click **NEXT** to select a bed



Now you're on the

Select a Bed

1. Your client(s) will display in blue boxes at the top left
2. Click on a client's blue box, then click on the light blue bed you would like to place them in
3. The bed should turn green
4. Repeat this for every client you selected
5. When done, click the **SAVE** button



Now you're on the

How To: Convert a Reservation to a Book In



This Function is almost identical to [Add a Book In \(on page 6\)](#), except that many fields have been pre-selected when the Reservation was created

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**



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

Go to the Reservations Tab

1. Click on the



Now you're on the

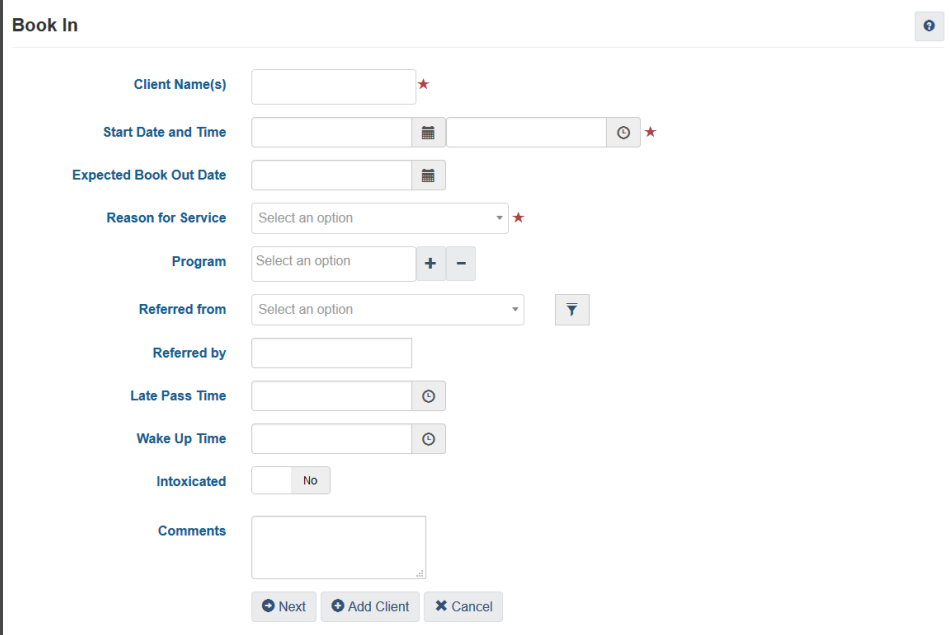
Convert Reservation

1. Click on the  button next to the client to be Booked In



Now you're on the **Add Book In** Screen, with data pre-filled from the data entered on the **Add Reservation** Screen

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The screenshot shows a 'Book In' form with the following fields and controls:

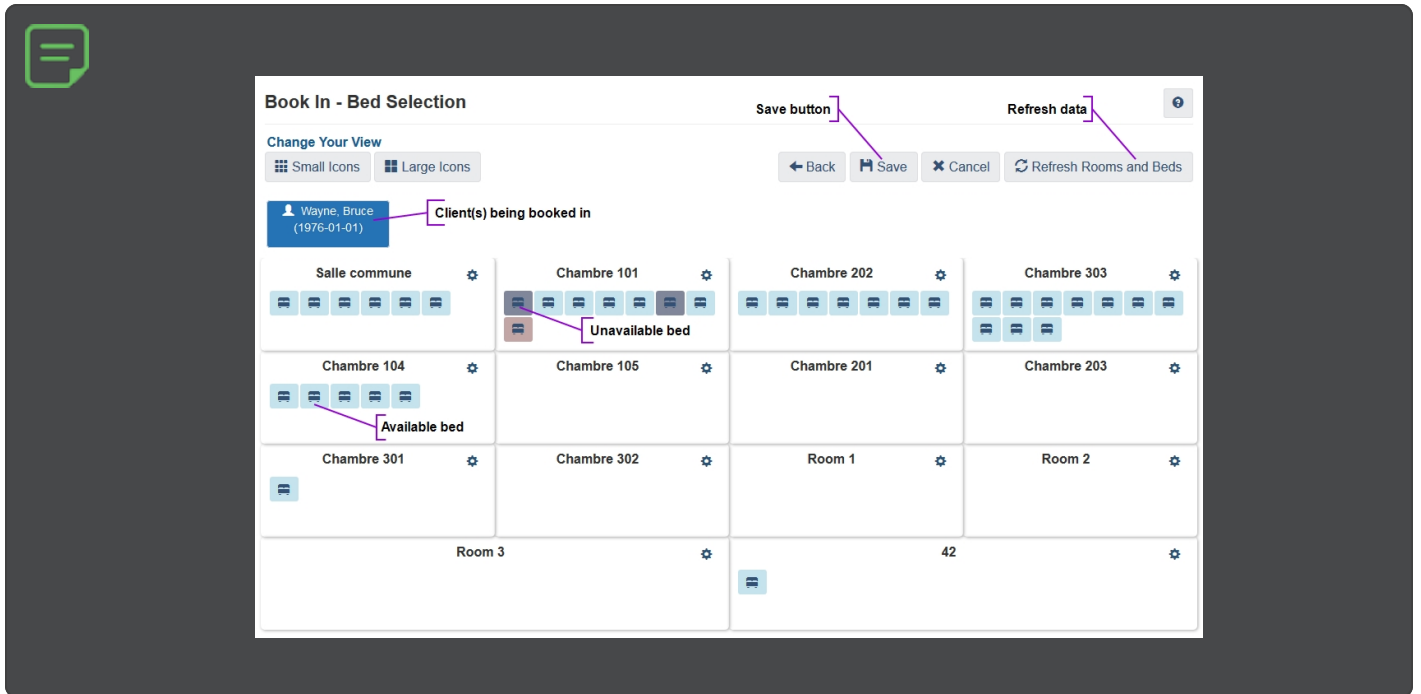
- Client Name(s)**: Text input field with a red asterisk.
- Start Date and Time**: Date and time pickers with a red asterisk.
- Expected Book Out Date**: Date picker.
- Reason for Service**: Dropdown menu with 'Select an option' and a red asterisk.
- Program**: Dropdown menu with 'Select an option', plus and minus buttons.
- Referred from**: Dropdown menu with 'Select an option' and a dropdown arrow.
- Referred by**: Text input field.
- Late Pass Time**: Time picker.
- Wake Up Time**: Time picker.
- Intoxicated**: Toggle switch currently set to 'No'.
- Comments**: Text area.
- Buttons**: 'Next', 'Add Client', and 'Cancel' buttons.

2. Enter book-in time (default is now)
3. Verify the fields entered for the Reservation are correct
4. Optional: are they allowed out past curfew? Enter the time they can stay out until
5. Optional: do they require a morning wake-up? Enter time here
6. Is the client intoxicated at the time of intake?
7. Optional: record additional notes about this book-in
8. When done, click **NEXT** to select a bed



Now you're on the **Bed Selection** Screen

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Select a Bed

1. Your client has been placed in the bed that was Reserved, unless the bed is currently occupied. Ensure that the client is in a bed. Optionally, you can change the bed the client is assigned to on this screen.
2. When done, click the **SAVE** button



Now you're on the **Admissions** List

How To: Check Bed Availability at Other Shelters

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Bed Availability Tab

1. Click on the **BED AVAILABILITY** Tab



Now you're on the **Bed Availability Tab**

Admissions

Booked In | Reservations | **Bed Availability**

This Community

Filter by Geographic Region

Filter by Text

Showing 1 to 3 of 3 entries | Show 10 entries

Service Provider	Occupancy Rate	Available Beds	Beds	Reservations	Action
Family Shelter	100%	0	1	0	[Action]
House of Hope	10%	33	37	0	[Action]
Transitional Housing	NaN%	0	0	0	[Action]

Refresh

Refresh data

How To: Transfer a Client to Another Bed

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Booked In Tab

1. Click on the **BOOKED IN** Tab



Now you're on the **Booked In Tab**

Admissions

Booked In | Reservations | Bed Availability

Showing 1 to 3 of 3 entries | Show 10 entries

Filter by text

Full Name	Date	Reason for Service	Room : Bed	Action
Allen, Barry	2017-01-12 06:50 AM	Housing - Eviction by Other	Chambre 101 : Bed 1	
Trump, Don	2016-12-08 12:00 AM	Housing - Eviction by Other	Chambre 101 : Bed 6	
Wayne, Bruce	2017-01-18 08:42 AM	Housing - Eviction by Landlord	Chambre 202 : Bed 3	

Add a new Book In **Add a new Express Book In** **Book Out this Client**

Manage Rooms and Beds **Edit this Stay** **Display this Stay**

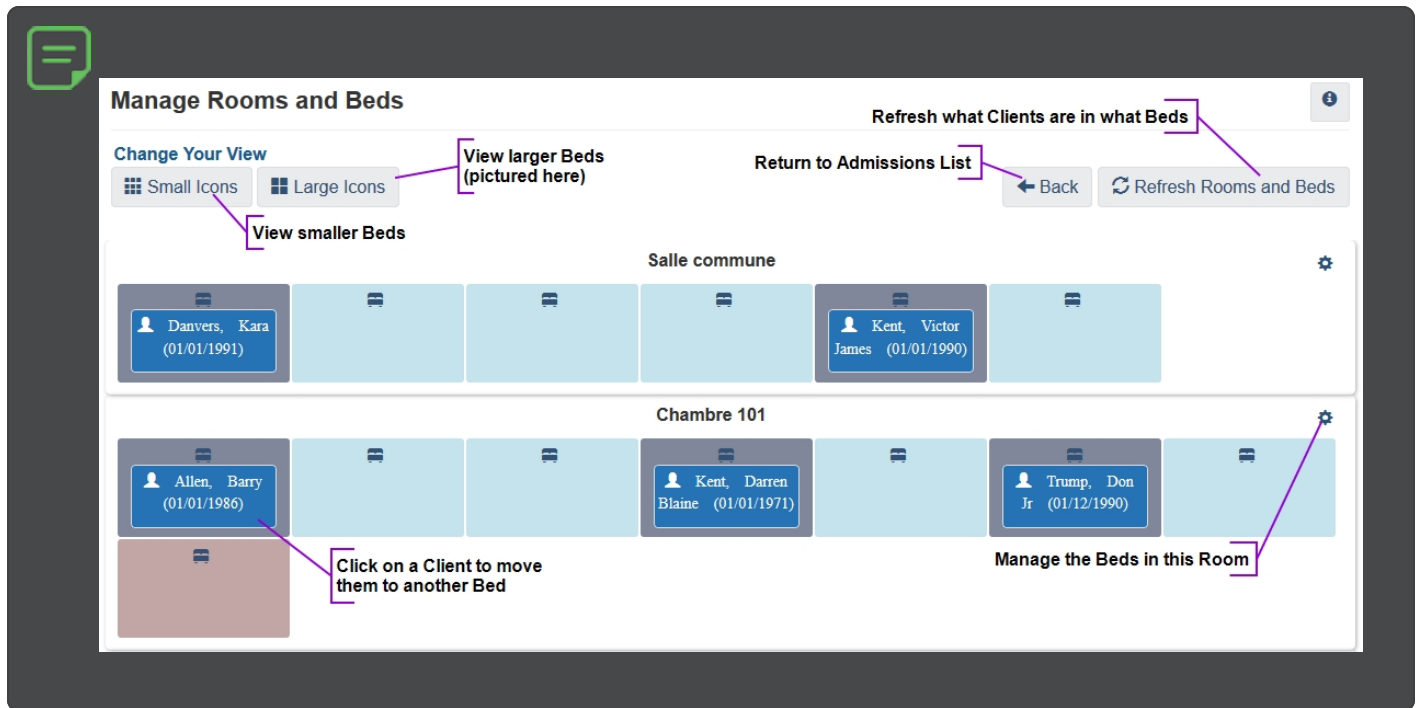
Go to the Manage Rooms and Beds Screen

1. Click on **MANAGE ROOMS AND BEDS**



Now you're on the **Manage Rooms and Beds** Screen

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Transfer a Client to Another Bed

1. Click on the Client's name
2. Click on a vacant Bed to move the Client to
3. On the pop-up that asks if you are sure, click on the **SAVE** button

How To: Put a Bed Out Of Service

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Manage Rooms and Beds Screen

1. Click on **MANAGE ROOMS AND BEDS**



Now you're on the **Manage Rooms and Beds** Screen

Manage Rooms and Beds

Refresh what Clients are in what Beds

Change Your View

Small Icons Large Icons

View larger Beds (pictured here)

Return to Admissions List

Back Refresh Rooms and Beds

View smaller Beds

Salle commune

Danvers, Kara (01/01/1991)

Kent, Victor James (01/01/1990)

Chambre 101

Allen, Barry (01/01/1986)

Kent, Darren Blaine (01/01/1971)

Trump, Don Jr (01/12/1990)

Click on a Client to move them to another Bed

Manage the Beds in this Room

Manage Beds in a Room

2. Click on the  for the Room you would like to manage



Now you're on the **Manage Beds** Screen for that Room

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Manage Beds: Room 3 Room Name View this Bed's status history

Showing 1 to 3 of 3 entries | Show 10 entries

Bed	Bed Type	Bed Status	Overflow	Mobile	Active	Action
Bed 1	Cot	In Service	Yes	No	Yes	
Bed 2	Cot	In Service	Yes	No	Yes	
Bed 3	Cot	In Service	Yes	No	Yes	

Add new Bed(s)

Back to Rooms List

Edit a Record

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

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

Deactivate a Bed

2. Change the Bed Status to some thing to reflect the reason for its being deactivated.
3. Toggle Active to "No"
4. Click the **SAVE** button

You're now on the **Beds List**

How To: Add a Bed to a Room

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Manage Rooms and Beds Screen

1. Click on **MANAGE ROOMS AND BEDS**



Now you're on the **Manage Rooms and Beds** Screen

Manage Rooms and Beds

Refresh what Clients are in what Beds

Change Your View

Small Icons Large Icons

View larger Beds (pictured here)

Return to Admissions List

Back Refresh Rooms and Beds

View smaller Beds

Salle commune

Danvers, Kara (01/01/1991)

Kent, Victor James (01/01/1990)

Chambre 101

Allen, Barry (01/01/1986)

Kent, Darren Blaine (01/01/1971)

Trump, Don Jr (01/12/1990)

Click on a Client to move them to another Bed

Manage the Beds in this Room

Manage Beds in a Room

2. Click on the  for the Room you would like to manage



Now you're on the **Manage Beds** Screen for that Room

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Manage Beds: Room 3 Room Name View this Bed's status history

Showing 1 to 3 of 3 entries | Show 10 entries Edit this Bed

Bed	Bed Type	Bed Status	Overflow	Mobile	Active	Action
Bed 1	Cot	In Service	Yes	No	Yes	
Bed 2	Cot	In Service	Yes	No	Yes	
Bed 3	Cot	In Service	Yes	No	Yes	

Add new Bed(s)

Back to Rooms List

Add a Bed

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

Add Bed x

Bed Name *

Bed Type Select an option *

Bed Status Select an option *

Overflow No

Mobile No

Active Yes

2. Enter a name for this Bed
3. Select a Type for this Bed
4. For Bed Status, select "In Service"

5. Optional: indicate whether this Bed is an Overflow Bed
6. Optional: indicate whether this Bed is a Mobile Bed
7. Toggle Active to "Yes"
8. Click the **SAVE** button



You're now on the **Manage Beds** Screen

How To: Add a Bed to a Room

Go to the Admissions List

1. Click on the **FRONT DESK MENU**
2. Click on **ADMISSIONS**



Now you're on the **Admissions List**

Go to the Manage Rooms and Beds Screen

1. Click on **MANAGE ROOMS AND BEDS**



Now you're on the **Manage Rooms and Beds** Screen

Manage Rooms and Beds

Refresh what Clients are in what Beds

Change Your View

Small Icons Large Icons

View larger Beds (pictured here)

View smaller Beds

Return to Admissions List

Back Refresh Rooms and Beds

Salle commune

Chambre 101

Click on a Client to move them to another Bed

Manage the Beds in this Room

Manage Beds in a Room

2. Click on the  for the Room you would like to manage



Now you're on the **Manage Beds** Screen for that Room

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Manage Beds: Room 3 Room Name View this Bed's status history

Showing 1 to 3 of 3 entries | Show 10 entries Edit this Bed

Bed	Bed Type	Bed Status	Overflow	Mobile	Active	Action
Bed 1	Cot	In Service	Yes	No	Yes	
Bed 2	Cot	In Service	Yes	No	Yes	
Bed 3	Cot	In Service	Yes	No	Yes	

Add new Bed(s)

Back to Rooms List

Add a Bed

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

Add Bed x

Bed Name *

Bed Type *

Bed Status *

Overflow No

Mobile No

Active Yes

2. Enter a name for this Bed
3. Select a Type for this Bed
4. For Bed Status, select "In Service"

5. Optional: indicate whether this Bed is an Overflow Bed
6. Optional: indicate whether this Bed is a Mobile Bed
7. Toggle Active to "Yes"
8. Click the **SAVE** button



You're now on the **Manage Beds** Screen

CHAPTER 3: Goods and Services


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How To: Add an Express Service	34
How To: Add a Goods and Services Transaction	36
How To: Manage an existing Goods and Services Transaction	38
How To: Add a Good to an Existing Goods and Services Transaction	39
How To: Add a Service to an Existing Goods and Services Transaction	41
How To: Close a Goods and Services Transaction	43

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**

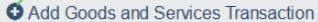
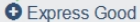
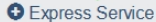
Goods and Services List


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**

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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**

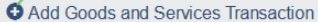
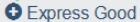
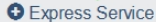
Goods and Services List


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	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**

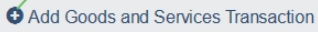
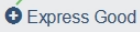
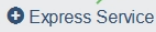
Goods and Services List

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**

County of Simcoe
Training Manual

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 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**: Two input fields. The first has a calendar icon, and the second has a clock icon. A red star icon is to the right of the second field.
- 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 floppy disk 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**

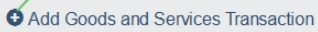
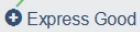

Goods and Services List

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

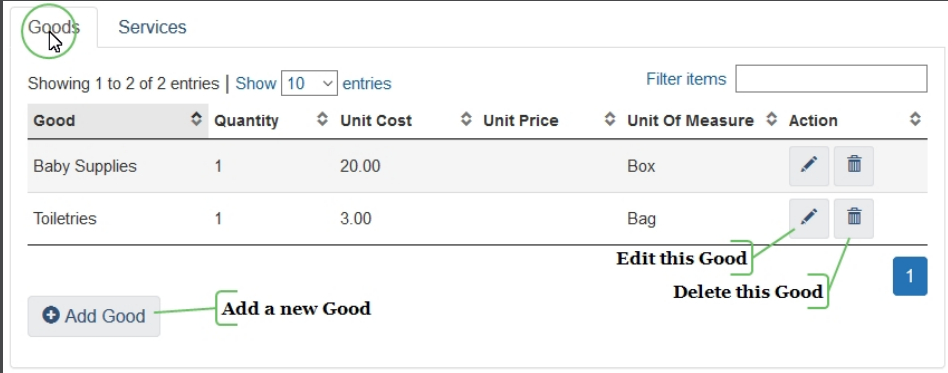
Manage a Goods and Services Transaction

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	Edit this Good Delete this Good
Toiletries	1	3.00		Bag	Edit this Good Delete this Good

[+ Add Good](#) **Add a new Good**

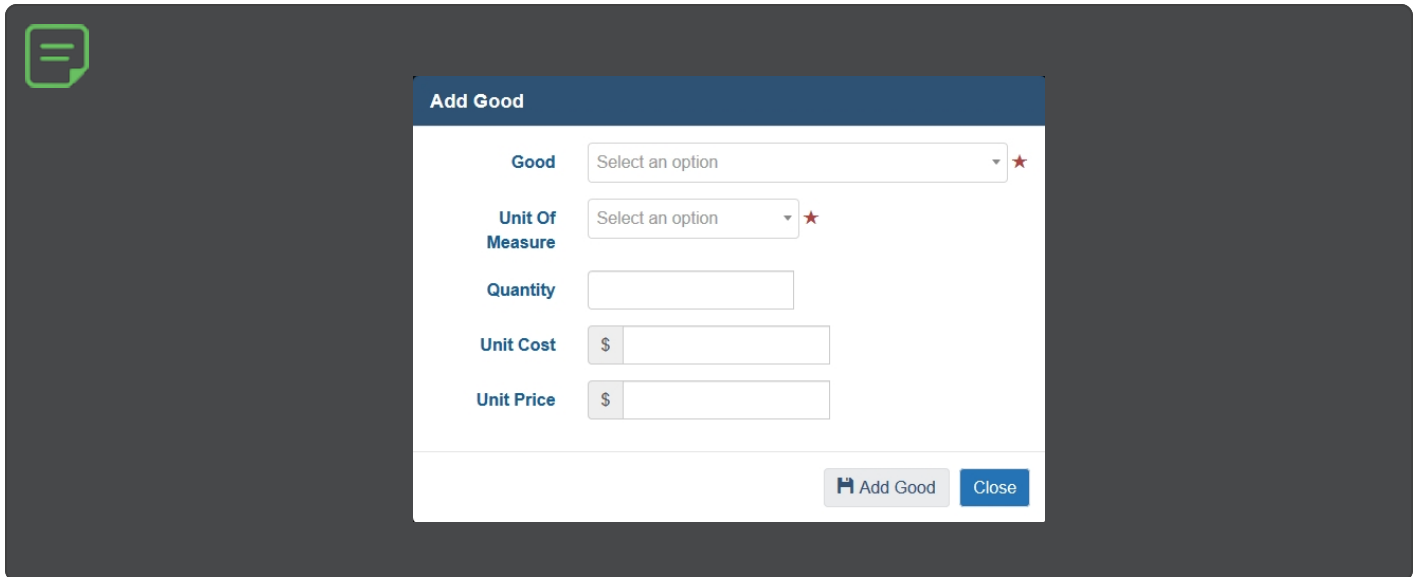
[Edit this Good](#) [Delete this Good](#) 1

Add a Good

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

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

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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 Good" is centered. 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 simple text input field.
- Unit Cost:** A text input field with a grey "\$" symbol on the left.
- Unit Price:** A text input field with a grey "\$" symbol on the left.

At the bottom right of the modal, there are two buttons: a light grey button with a save icon and the text "Add Good", and a blue button with the text "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

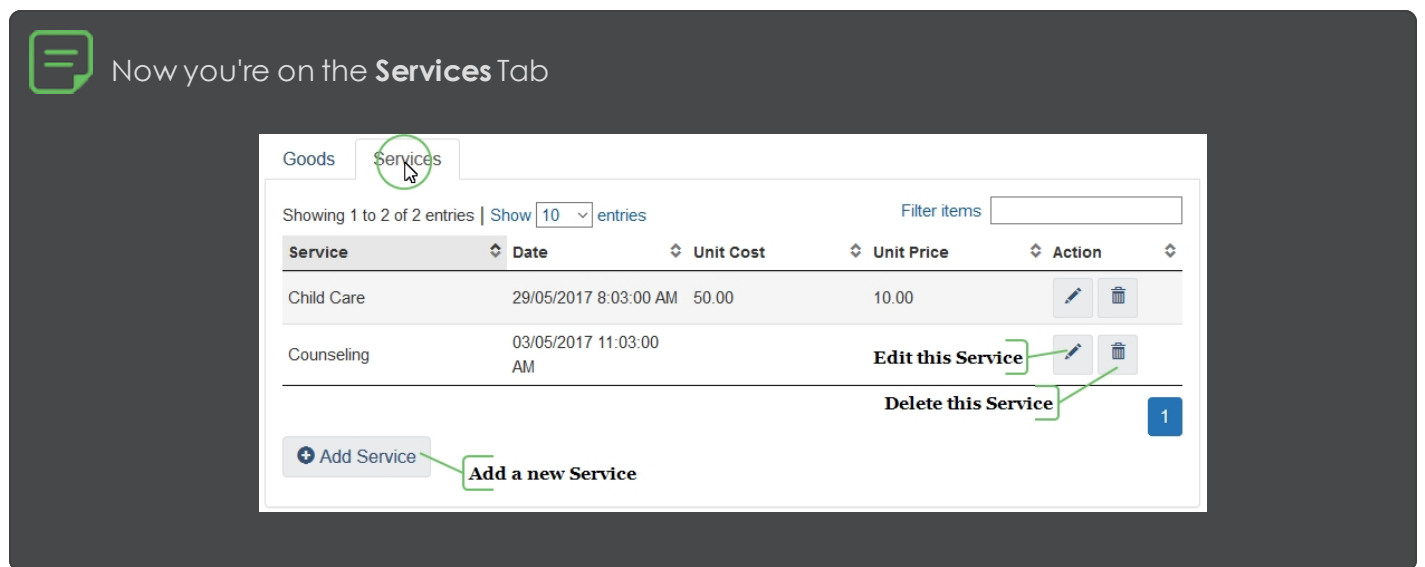
How To: Add a Service to an Existing Goods and Services Transaction

Manage a Goods and Services Transaction

See [Manage an existing Goods and Services Transaction \(on page 38\)](#).

Go to Services Tab

1. Click on the **SERVICES** tab



Add a Service

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



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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 one has a calendar icon, and the bottom one has a clock icon. A red star icon is to the right of the second field.
- End Date and Time:** Two input fields. The top one has a calendar icon, and the bottom one 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 on the left.
- Service Price:** A currency input field with a "\$" symbol on the left.


At the bottom right of the modal, there are two buttons: a grey "Add Service" button and a blue "Close" button.

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**

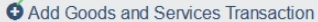
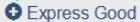
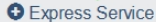
Goods and Services List


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:

Incidents

Chapter Contents

How To: See a list of recent Incidents at the Active Service Provider	46
How To: Add an Incident	47

How To: See a list of recent Incidents at the Active Service Provider

Go to the Incidents List

1. Click on the **FRONT DESK MENU**
2. Click on **INCIDENTS**

Now you're on the **Incidents List**

Incident List

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

Show 10 entries

Filter by text
Filter items

Nature of Incident	Location	Date	Witnesses	Involved	Attachments	Action
Criminal Act(s)	Backyard patio	2017-10-02		Jackson, Michael	Incident Report.txt	
Verbal Abuse Against Staff	Front desk	2017-10-20	Phil, Doctor	Sutton, Sarah		

Display this Incident

Edit this Incident

Delete this Incident

+ Add Incident **Add a new Incident**

1


Show entries from the past week only

1. Click on the **FILTER** button in the top left, under the page heading
2. Select **1 WEEK(S)**

How To: Add an Incident

Go to the Incidents List







1. Click on the **FRONT DESK MENU**
2. Click on **INCIDENTS**

 Now you're on the **Incidents List**

Incident List

Filter: 1 Month(s) **Filter by date** **Filter by text** Filter items

Show 10 entries


Nature of Incident	Location	Date	Witnesses	Involved	Attachments	Action
Criminal Act(s)	Backyard patio	2017-10-02		Jackson, Michael	Incident Report.txt	  
Verbal Abuse Against Staff	Front desk	2017-10-20	Phil, Doctor	Sutton, Sarah		  

Add Incident **Add a new Incident**

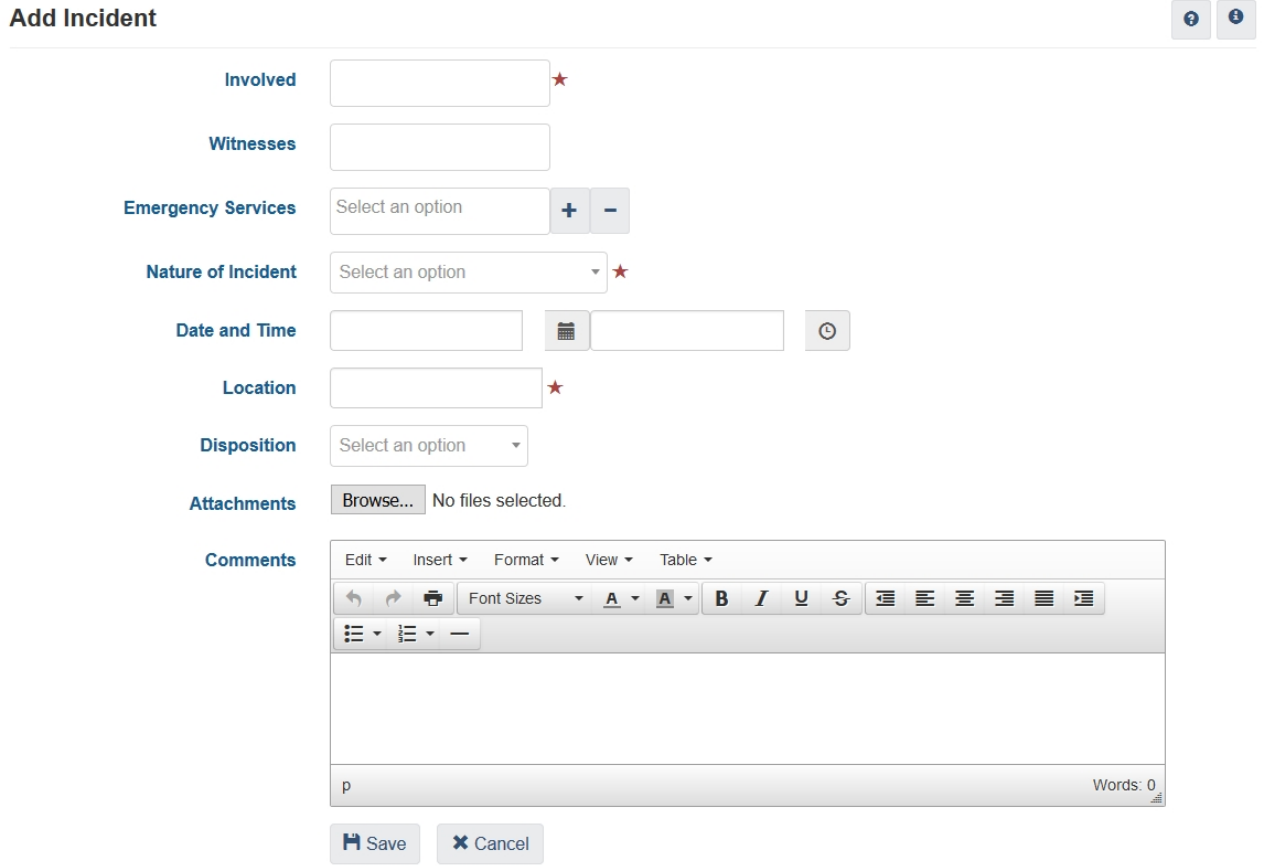
Display this Incident **Edit this Incident** **Delete this Incident**

Add a Incident

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

 Now you're on the **Add Incident** Screen

County of Simcoe Training Manual



Add Incident

Involved ★

Witnesses

Emergency Services + -

Nature of Incident ▼ ★

Date and Time

Location ★

Disposition ▼

Attachments No files selected.

Comments

Edit ▼ Insert ▼ Format ▼ View ▼ Table ▼

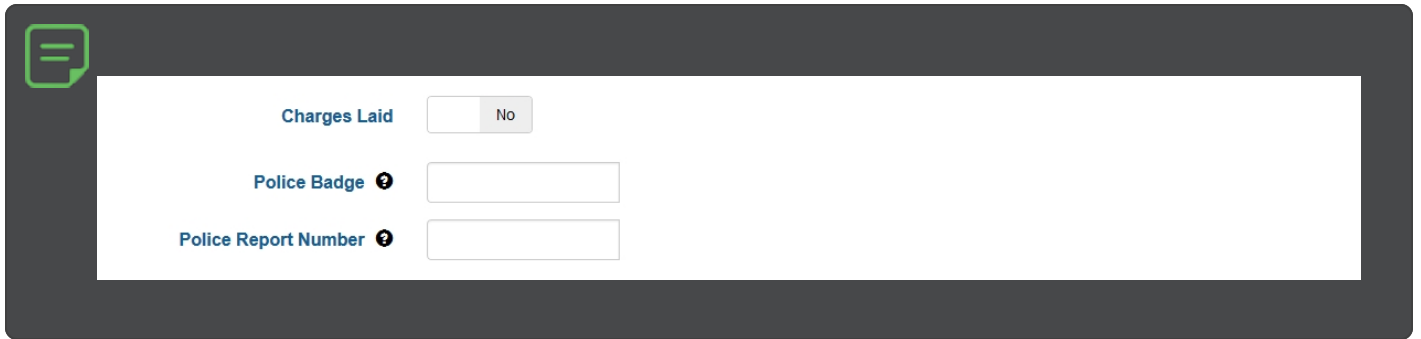
Font Sizes **A** **A** **B** *I* U ~~S~~

Words: 0

2. In the Involved field, select the names of the people (i.e. Clients, Staff) who were involved in this Incident
3. In the Witnesses field, optionally select the names of any other people (i.e. Clients, Staff) who were witness to this Incident, but who were not involved
4. Select which Emergency Services were involved in this Incident, if any



If "Police" is selected, additional fields will display:



A screenshot of a web form interface. The form is white and set against a dark grey background. In the top left corner of the form area, there is a green icon of a document with a checkmark. The form contains three fields: a toggle switch for 'Charges Laid' currently set to 'No', a text input field for 'Police Badge' with a question mark icon, and another text input field for 'Police Report Number' also with a question mark icon.

5. Select the type of the Incident
6. Enter the Date and Time of this Incident
7. Type in the Location of this Incident
8. In the Disposition field, indicate how the Incident was resolved
9. Optionally, upload a file, such as an Incident Report
10. Optionally, record additional notes about this Incident
11. Click **SAVE** when done, or **CANCEL** to go back



Now you're on the **Incidents List**

CHAPTER 5:

Service Restrictions

Chapter Contents

How To: See who is Currently Restricted from your Service Provider	51
How To: Identify an Active Service Restriction on a Client	52
How To: Add a Service Restriction	53
How To: Lift a Service Restriction	56

How To: See who is Currently Restricted from your Service Provider

Go to the [Service Restrictions List](#)

1. Click on the **FRONT DESK MENU**
2. Click on **SERVICE RESTRICTIONS**

Now you're on the **Service Restriction List**

Service Restriction List

All Current **Filter by status**

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

Show 10 entries

Filter by text
Filter items

Client Name	Service Providers	Modules	Start Date and Time	End Date and Time	Reason for Restriction	Action
Rogers, Steve	House of Hope	Admissions	2016/12/14 10:53 AM	2016/12/14 10:53 AM	Safety / Security Risk	
Trump, Don	House of Hope	Food Banks	2016/12/08 12:00 AM	2016/12/08 12:00 AM	Court Order	

Add a new Service Restriction
+ Add Service Restriction

Display this Service Restriction
Edit this Service Restriction

1

Show only the [Current Restrictions](#)

1. Click on the **CURRENT** button in the top left

How To: Identify an Active Service Restriction on a Client

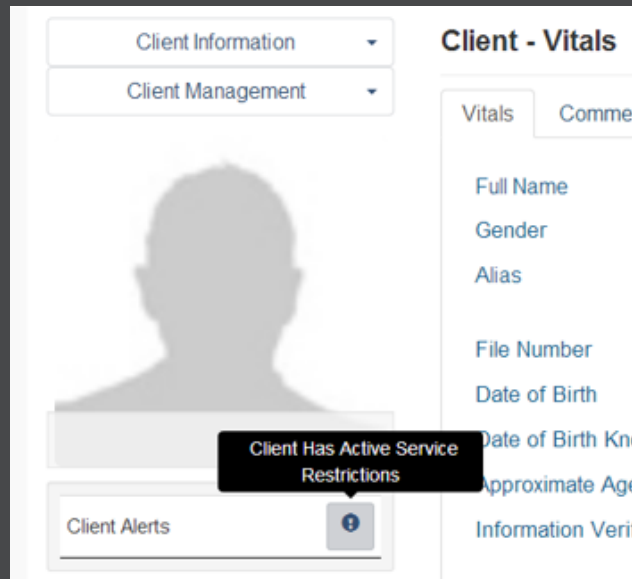
Open a Client File

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

Click on the Client Alert



If the Client has an active Service Restriction, the **Client Control Panel** will include a Client Alert indicating the current Service Restriction.



1. Click on the  button in the [Client Control Panel](#)




Now you're on the **Client - Service Restriction List**, which is similar to the **Service Restriction List**, but only shows Service Restrictions for the current Client.

How To: Add a Service Restriction

Go to the [Service Restrictions List](#)

1. Click on the **FRONT DESK MENU**
2. Click on **SERVICE RESTRICTIONS**

 Now you're on the **Service Restriction List**





Service Restriction List

All Current **Filter by status**

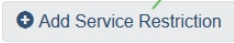
Filter: 1 Week(s) **Filter by date**



Show 10 entries


Filter by text
Filter items

Client Name	Service Providers	Modules	Start Date and Time	End Date and Time	Reason for Restriction	Action
Rogers, Steve	House of Hope	Admissions	2016/12/14 10:53 AM	2016/12/14 10:53 AM	Safety / Security Risk	 
Trump, Don	House of Hope	Food Banks	2016/12/08 12:00 AM	2016/12/08 12:00 AM	Court Order	 

Add a new Service Restriction




Display this Service Restriction  **Edit this Service Restriction** 

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

Add a Service Restriction

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

 Now you're on the **Add Service Restriction** Screen

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The screenshot shows a web-based form titled "Add Service Restriction". At the top left is a green icon of a document with a checkmark. The form has a white background and is set against a dark grey background. It contains the following fields and controls:

- Client Name:** A dropdown menu with a plus icon to its left.
- Requested by:** A dropdown menu with "Select an option" and a red star icon to its right.
- Start Date and Time:** A date field with "2016-12-14", a calendar icon, a time field with "10:57 AM", a clock icon, and a red star icon.
- End Date and Time:** A date field with "2016-12-14", a calendar icon, a time field with "10:57 AM", a clock icon, and a red star icon.
- Service Providers:** A dropdown menu with "Select an option", plus and minus icons, and a red star icon.
- Modules:** A dropdown menu with "Select an option", plus and minus icons, and a red star icon.
- Reason for Restriction:** A dropdown menu with "Select an option" and a red star icon.
- Comments:** A rich text editor with a toolbar containing menus for Edit, Insert, Format, View, and Table. The toolbar includes icons for undo, redo, print, font size, bold, italic, underline, link, bulleted list, numbered list, and indent. The text area contains a single paragraph "p" and a word count of "Words: 0".
- Buttons:** A red star icon above "Save" and "Cancel" buttons at the bottom.

2. Enter the Client's name. If you arrived here from the **Client - Service Restrictions** List, the client's name has already been selected.
3. Enter the name of the person issuing the Service Restriction in the Requested by field
4. Verify the Start Date and Time of the Service Restriction
5. Enter the End Date and Time of the Service Restriction
6. Select the Service Provider(s) that the client is restricted from
7. Select the Module(s) that the client is restricted from. For instance, if the client is restricted from shelter operations, select Admissions
8. Select the Reason for Restriction
9. Record some additional notes about this Service Restriction
10. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Client - Service Restriction** List, which is similar to the **Service Restriction** List, but only shows Service Restrictions for the current Client.

How To: Lift a Service Restriction

Go to the [Service Restrictions List](#)

1. Click on the **FRONT DESK MENU**
2. Click on **SERVICE RESTRICTIONS**

 Now you're on the **Service Restriction List**





Service Restriction List

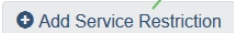
All Current **Filter by status**



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


Show 10 entries

Filter by text
Filter items

Client Name	Service Providers	Modules	Start Date and Time	End Date and Time	Reason for Restriction	Action
Rogers, Steve	House of Hope	Admissions	2016/12/14 10:53 AM	2016/12/14 10:53 AM	Safety / Security Risk	 
Trump, Don	House of Hope	Food Banks	2016/12/08 12:00 AM	2016/12/08 12:00 AM	Court Order	 

Add a new Service Restriction


Display this Service Restriction  **Edit this Service Restriction** 

 You can also [Open a Client File \(on page 1\)](#) and use the **CLIENT MANAGEMENT MENU** to click on **SERVICE RESTRICTIONS** 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

End the Service Restriction

1. Change the End Date and Time to the time that the Service Restriction is being lifted
2. Click on **SAVE**

CHAPTER 6: Turn Aways

Chapter Contents

How To: See who has been Turned Away from your Service Provider Recently	59
How To: Add a Turn Away	60
How To: Add an Anonymous Turn Away	63

How To: See who has been Turned Away from your Service Provider Recently

Go to the Turn Away List

1. Click on the **FRONT DESK MENU**
2. Click on **TURN AWAYS**

Now you're on the **Turn Away List**

Turn Away List

Filter: All Filter by date range Filter by text

Show 10 entries

Client Name	Family	Service Provider	Date and Time of Turn Away	Reason for Turn Away	Action
Anonymous, Anonymous		House of Hope	2016-10-17 06:11:00 AM	Decided not to Stay	
Kent, Darren		House of Hope	2016-10-20 08:38:00 AM	Insufficient Food Supply	

Add a new Turn Away

Add Turn Away Add Anonymous Turn Away Add a new anonymous Turn Away

Display this Turn Away Edit this Turn Away Delete this Turn Away

1


Show entries from the past week only

1. Click on the **FILTER** button in the top left, under the page heading
2. Select **1 WEEK(S)**

How To: Add a Turn Away

Go to the Turn Away List







1. Click on the **FRONT DESK MENU**
2. Click on **TURN AWAYS**

 Now you're on the **Turn Away List**

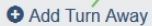
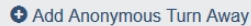
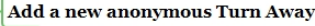
Turn Away List

Filter: All Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Family	Service Provider	Date and Time of Turn Away	Reason for Turn Away	Action
Anonymous, Anonymous		House of Hope	2016-10-17 06:11:00 AM	Decided not to Stay	  
Kent, Darren		House of Hope	2016-10-20 08:38:00 AM	Insufficient Food Supply	  

Add a new Turn Away


  

Display this Turn Away **Edit this Turn Away** **Delete this Turn Away**

1

Add a Turn Away

1. Click on the **ADD TURN AWAY** button.

 Now you're on the **Add Turn Away Screen**

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Training Manual

The screenshot shows a web-based form titled "Add Turn Away". At the top left is a green icon of a document with a checkmark. The form itself is white with a dark grey border. It contains the following fields and controls:

- Client Name:** A dropdown menu with a red star icon to its right.
- Family Members:** A dropdown menu with "Select an option" text, and plus (+) and minus (-) buttons to its right.
- Effective Date and Time:** Two input fields, the first with a calendar icon and the second with a clock icon.
- Number of Adults:** A text input field with a red star icon to its right.
- Number of Children:** A text input field with a red star icon to its right.
- Reason for Turn Away:** A dropdown menu with "Select an option" text and a red star icon to its right.
- Requested by:** A dropdown menu with "Select an option" text and a red star icon to its right.
- Referred by:** A text input field.
- Referred from:** A dropdown menu with "Select an option" text and a filter icon to its right.
- Referred to:** A dropdown menu with "Select an option" text and a filter icon to its right.
- Comments:** A large text area.
- Buttons:** "Add Client" (with a plus icon), "Save" (with a floppy disk icon), and "Cancel" (with an X icon).

2. Enter the Client's name
3. If any of the client's family members are also being turned away, select them in the Family Members field
4. Verify the date and time that the turn away occurred
5. Enter the number of adults and children being turned away
6. Select the best Reason for Turn Away in the drop-down menu
7. Enter the name of the person issuing the Turn Away in the Requested by field
8. Optional: enter the name of the person who referred the client to you in the Referred by field
9. Optional: enter the name of the agency or place that referred the client to you in the Referred from field
10. Optional: if you are now going to refer the client to another agency or place, enter it in the Referred to field

11. Optional: Record additional notes about this Turn Away
12. Click **SAVE** when done, or **CANCEL** to go back




Now you're on the **Turn Away** List

How To: Add an Anonymous Turn Away

Go to the Turn Away List







1. Click on the **FRONT DESK MENU**
2. Click on **TURN AWAYS**

 Now you're on the **Turn Away List**


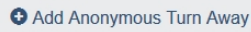
Turn Away List

Filter: All Filter by date range Filter by text
Filter items

Show 10 entries

Client Name	Family	Service Provider	Date and Time of Turn Away	Reason for Turn Away	Action
Anonymous, Anonymous		House of Hope	2016-10-17 06:11:00 AM	Decided not to Stay	  
Kent, Darren		House of Hope	2016-10-20 08:38:00 AM	Insufficient Food Supply	  

Add a new Turn Away


  **Add a new anonymous Turn Away**

Display this Turn Away **Edit this Turn Away** **Delete this Turn Away**

1

Add an Anonymous Turn Away

1. Click on the **ADD ANONYMOUS TURN AWAY** button.

 Now you're on the **Add Anonymous Turn Away Screen**

County of Simcoe Training Manual

The screenshot shows a web-based form titled "Add Anonymous Turn Away". The form includes the following fields and controls:

- Presumed Aboriginal:** A toggle switch set to "No".
- Observed Disability:** A toggle switch set to "No".
- Age Group:** A dropdown menu with "Select an option" and a red asterisk.
- Gender:** A dropdown menu with "Select an option" and a red asterisk.
- Effective Date and Time:** A date and time picker.
- Number of Adults:** A text input field with a red asterisk.
- Number of Children:** A text input field with a red asterisk.
- Reason for Turn Away:** A dropdown menu with "Select an option" and a red asterisk.
- Requested by:** A dropdown menu with "Select an option" and a red asterisk.
- Referred by:** A text input field.
- Referred from:** A dropdown menu with "Select an option" and a filter icon.
- Referred to:** A dropdown menu with "Select an option" and a filter icon.
- Comments:** A text area.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

2. Enter whether you presume the person being turned away is Aboriginal or not
3. Enter whether you observe the person being turned away has a disability or not
4. Enter the age group of the person being turned away
5. Enter the gender of the person being turned away
6. Verify the date and time that the turn away occurred
7. Enter the number of adults and children being turned away
8. Select the best Reason for Turn Away in the drop-down menu
9. Enter the name of the person issuing the Turn Away in the Requested by field
10. Optional: enter the name of the person who referred the client to you in the Referred by field
11. Optional: enter the name of the agency or place that referred the client to you in the Referred from field
12. Optional: if you are now going to refer the client to another agency or place, enter it in the Referred to field
13. Optional: Record additional notes about this Turn Away
14. Click **SAVE** when done, or **CANCEL** to go back

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Now you're on the **Turn Away List**