Training Manual

Shelter Worker

County of Simcoe

Prepared by

ACRE Consulting

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Contents

CHAPTER 2: Admissions

Chapter Contents

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

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
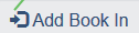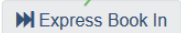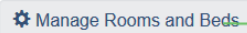
Add a Book-In

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

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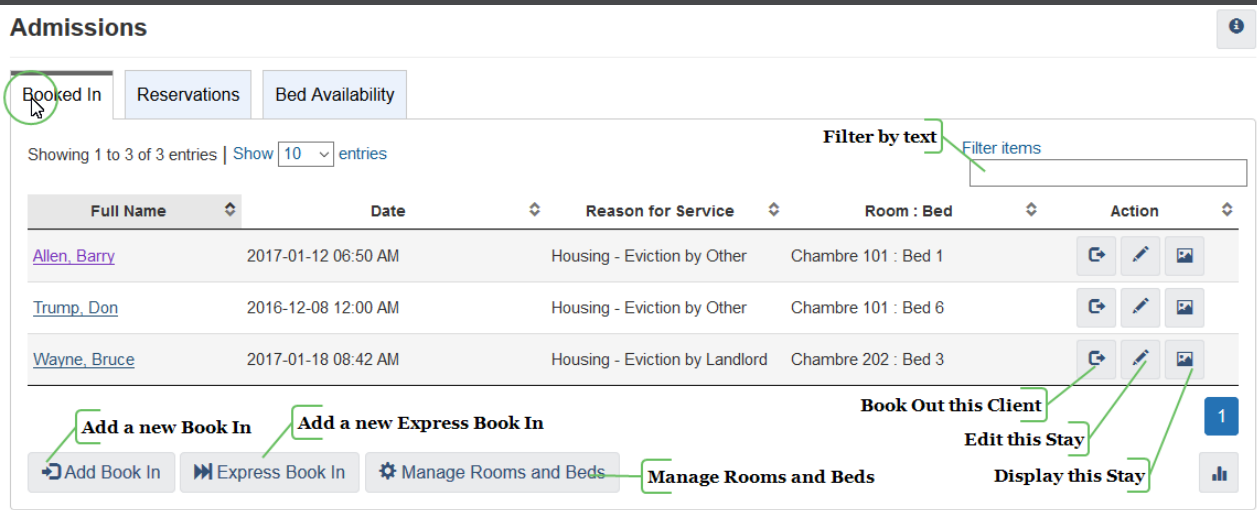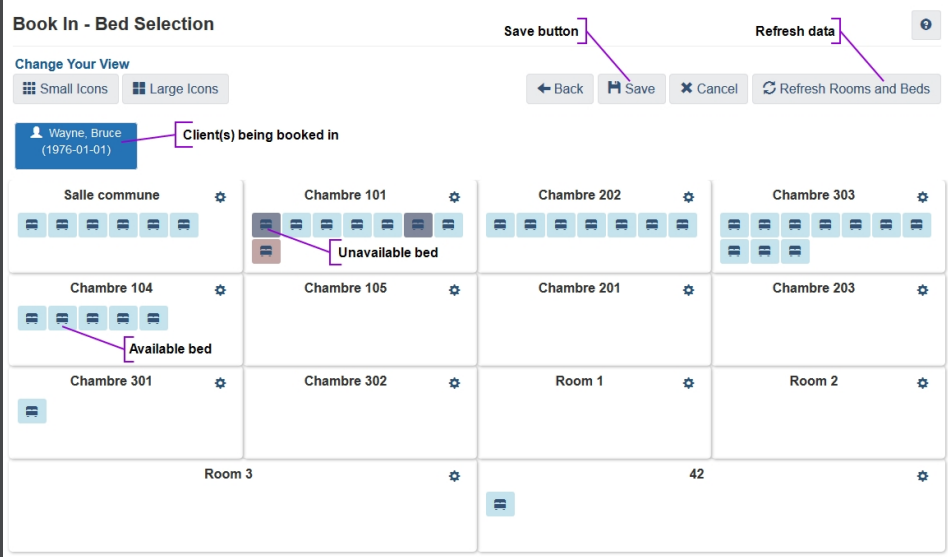
If the client is part of a family, once you select the first family member, a button will appear with the label Book In Family. If you click on it, it will automatically add all family members to this book-in record.

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.
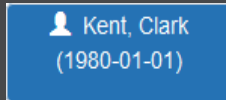
Kent, Clark
(1980-01-01)
When the Client box is blue, it is unselected.
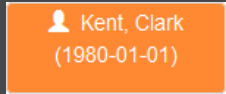
Kent, Clark
(1980-01-01)
When the Client box is orange, it is selected.

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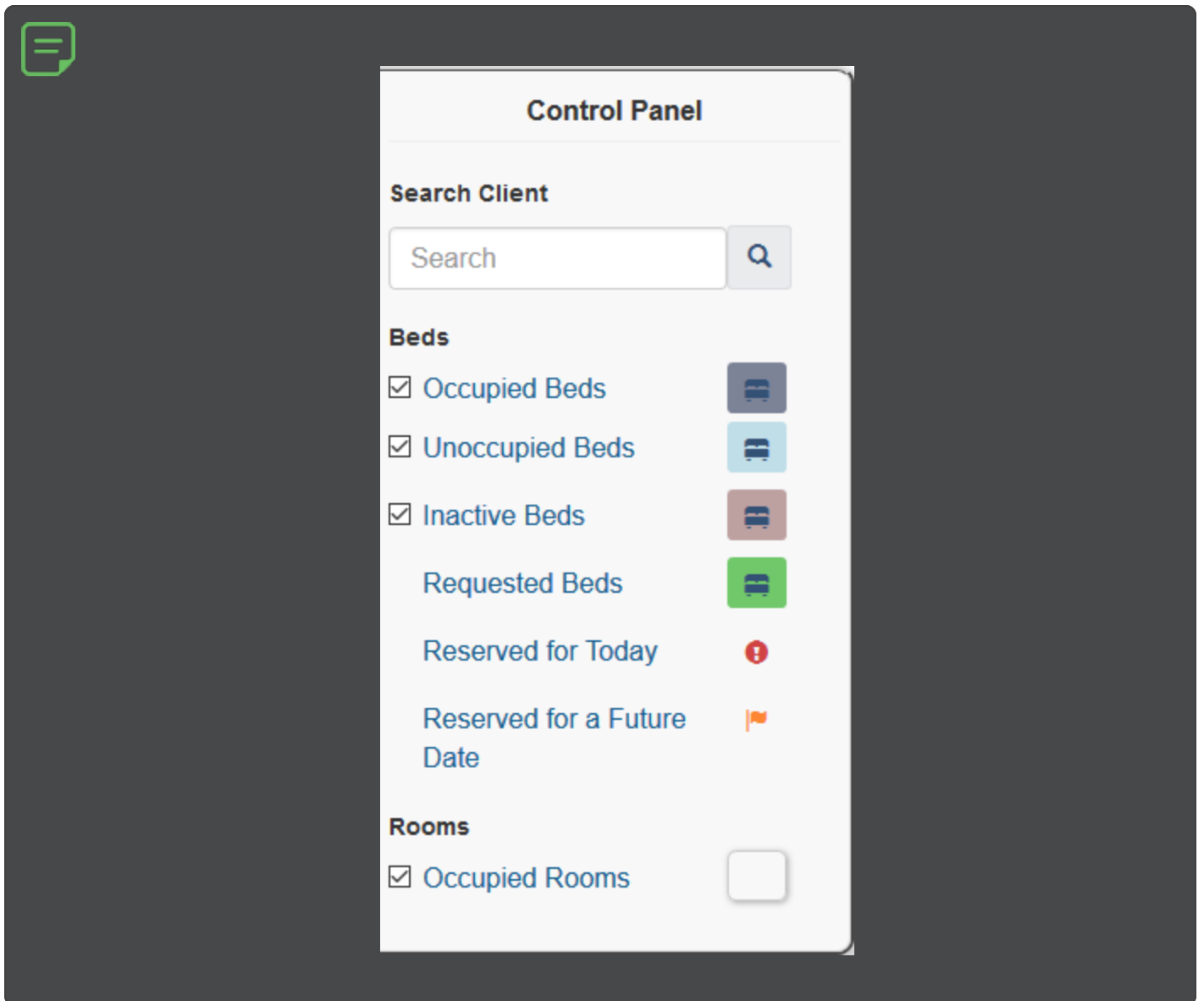
4. Repeat this for every client you selected
5. When done, click the **SAVE** button

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

Book-Out Client

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

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

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
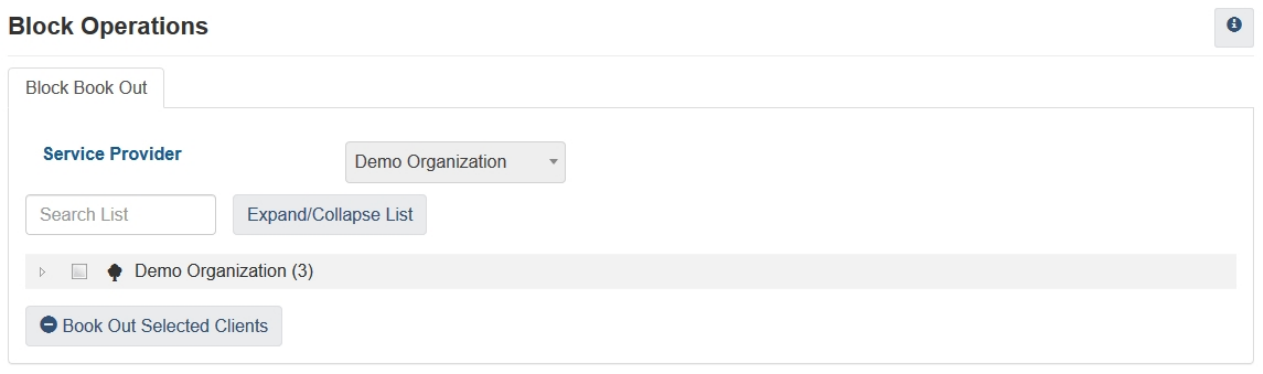6. When done, click **BOOK OUT**, or click **CANCEL** to scrap

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

Block Operations

Block Book Out

Service Provider   Demo Organization ▾

Search List   Expand/Collapse List

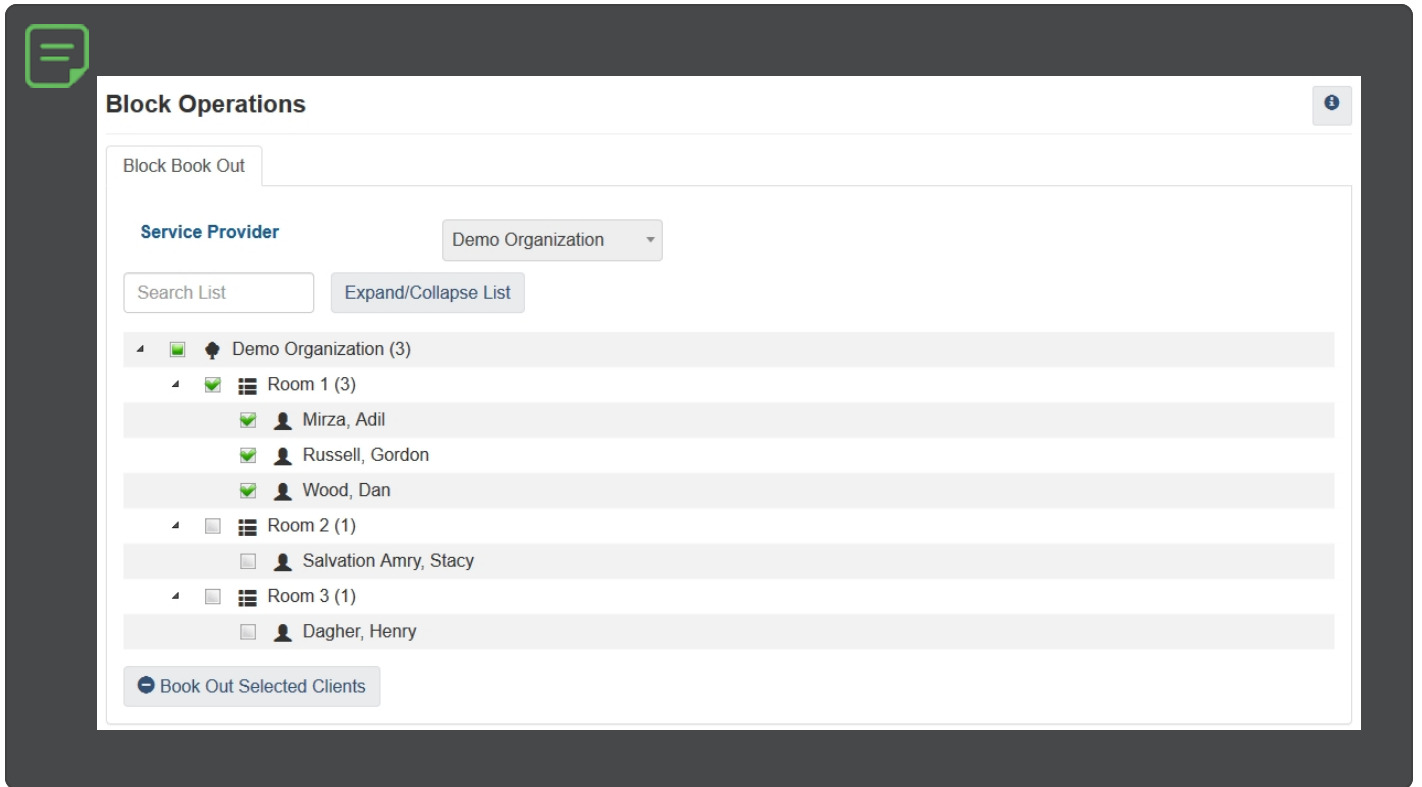▲ ☑ ♠ Demo Organization (3)
    ▲ ☑ ☰ Room 1 (3)
        ☑ 👤 Mirza, Adil
        ☑ 👤 Russell, Gordon
        ☑ 👤 Wood, Dan
    ▲ ☐ ☰ Room 2 (1)
        ☐ 👤 Salvation Amry, Stacy
    ▲ ☐ ☰ Room 3 (1)
        ☐ 👤 Dagher, Henry

⊖ Book Out Selected Clients

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

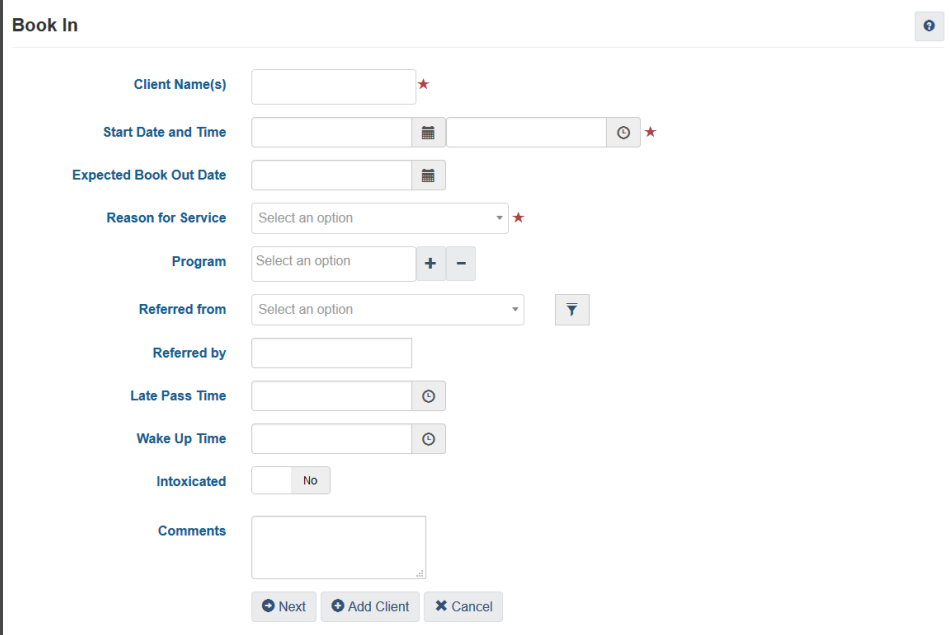## Go to the Reservations Tab

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

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
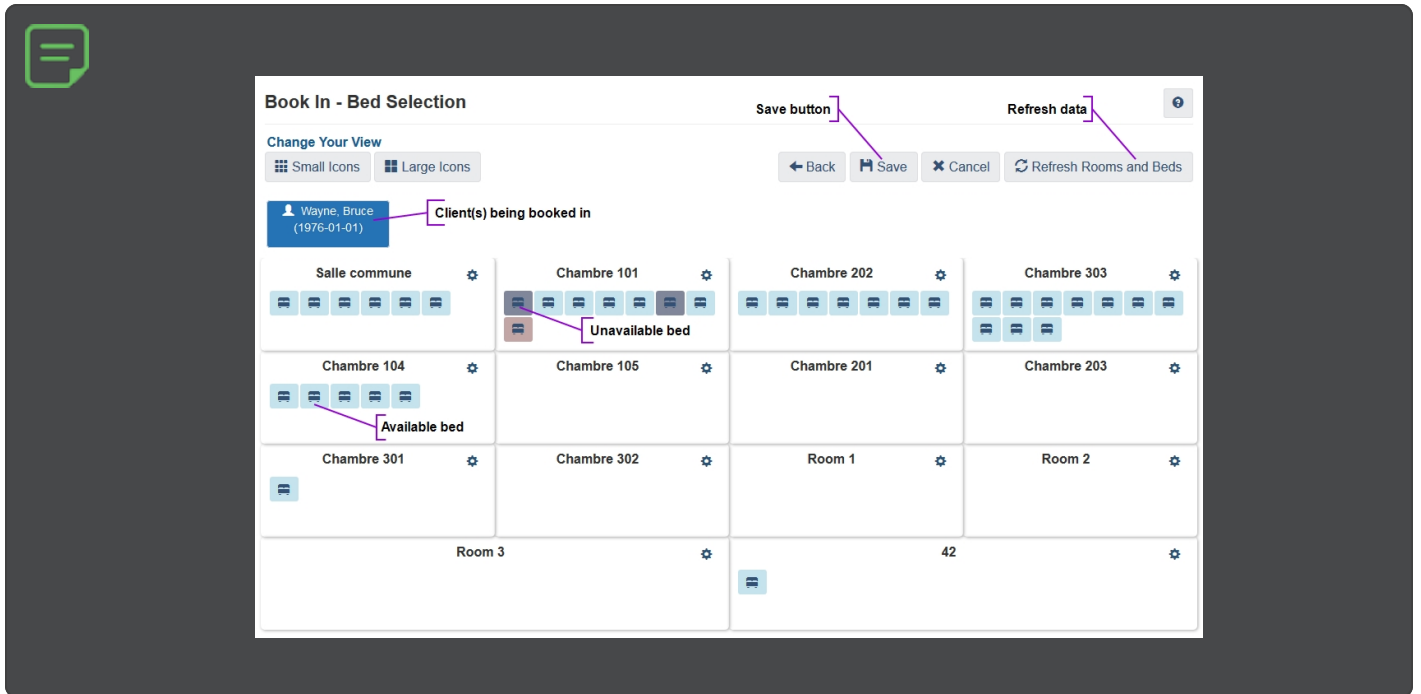
Select a Bed

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

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

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

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 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

Edit a Record

1. Click on [✎] or [✎ Edit] 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 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

Add a Bed

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

You're now on the **Add Bed** pop-up

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 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

Add a Bed

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

You're now on the **Add Bed** pop-up

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

Chapter Contents

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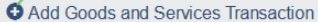
Now you're on the **Goods and Services List**

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

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**

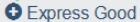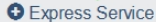Now you're on the **Goods and Services List**

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	3 Goods / Services • Goods • Services ○ 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

Add Goods and Services Transaction   Express Good   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

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**

Add a Goods and Services Transaction
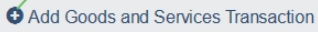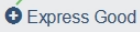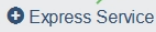
1. Click on the **ADD GOODS AND SERVICES TRANSACTION** button.

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

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**

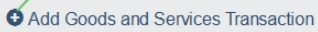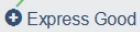You can also Open a Client File (on page 1) and use the **CLIENT MANAGEMENT MENU** to click on **GOODS AND SERVICES** instead of using the Front Desk Menu.

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
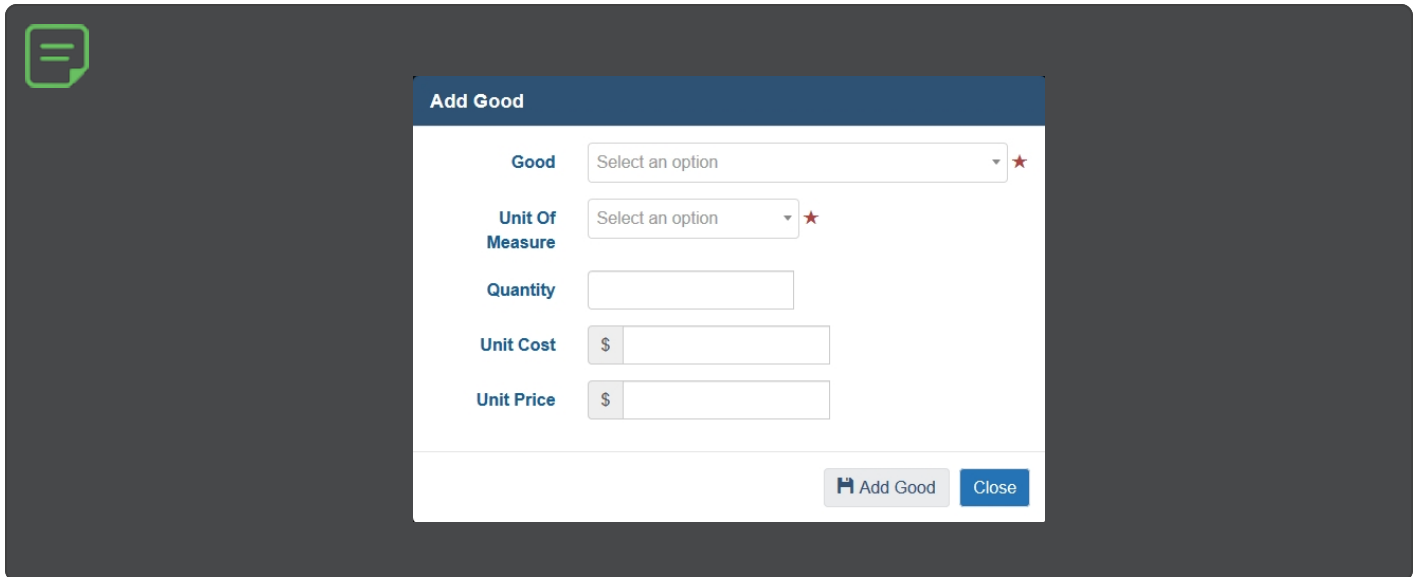
Add a Good

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

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

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

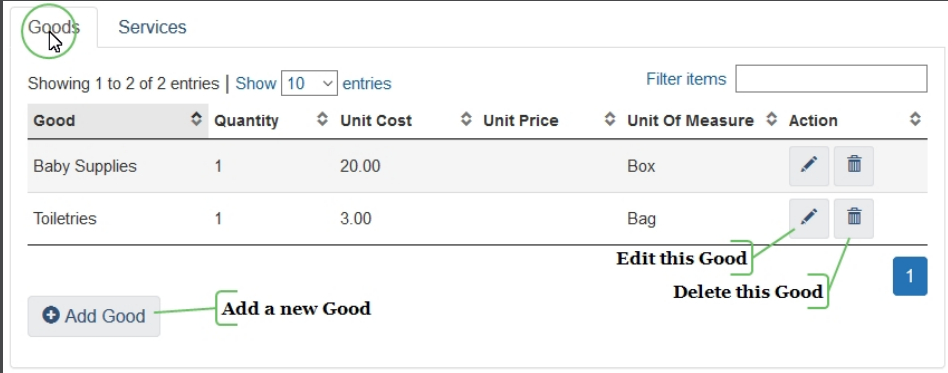## Manage a Goods and Services Transaction

See Manage an existing Goods and Services Transaction (on page 38).

Go to Services Tab

1. Click on the **SERVICES** tab

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

Add a Service

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

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

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
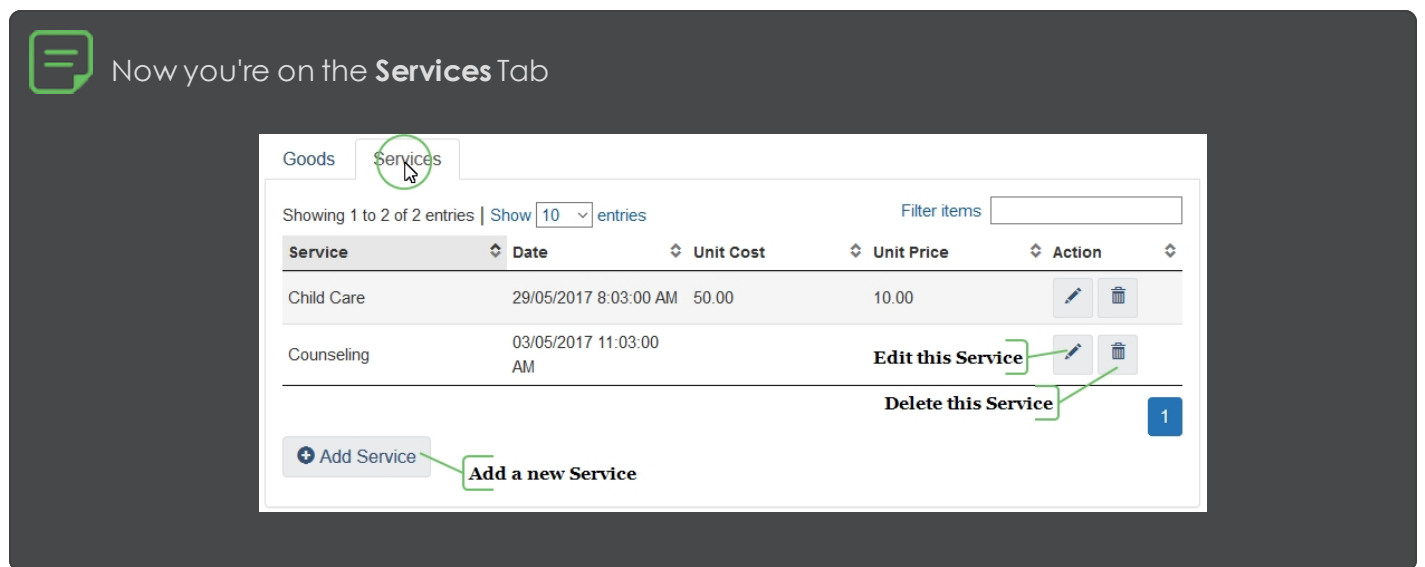7. Optionally, you may enter the Price of this Service
8. Click **SAVE** when done

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

Show 10 ▾ entries   Filter items

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	3 Goods / Services ▾ • Goods • Services ○ Advocacy ○ Counseling ○ Financial Aid	🖼 ⚙ ✏
Wayne, Bruce	2017-10-24 - 2017-10-24	Needle Exchange	🖼 ⚙ ✏

Display this Transaction
Manage this Transaction
Edit this Transaction

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

⊕ Add Goods and Services Transaction   ⊕ Express Good   ⊕ Express Service

1

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

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

Go to the Incidents List

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

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

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

Show 10 ∨ entries

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

1

⊕ Add Incident — Add a new Incident

Add a Incident

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

Now you're on the **Add Incident** Screen
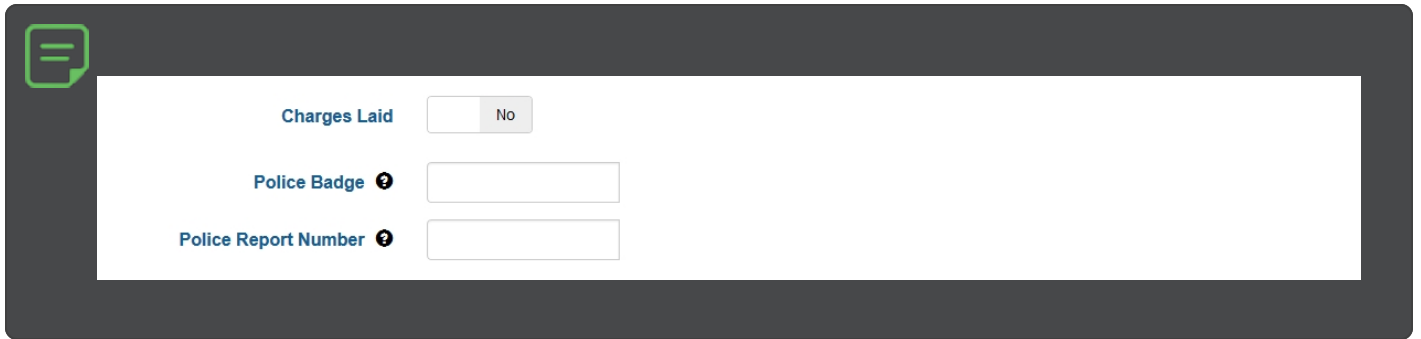
2. In the Involved field, select the names of the people (i.e. Clients, Staff) who were involved in this Incident

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:

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

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**

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.
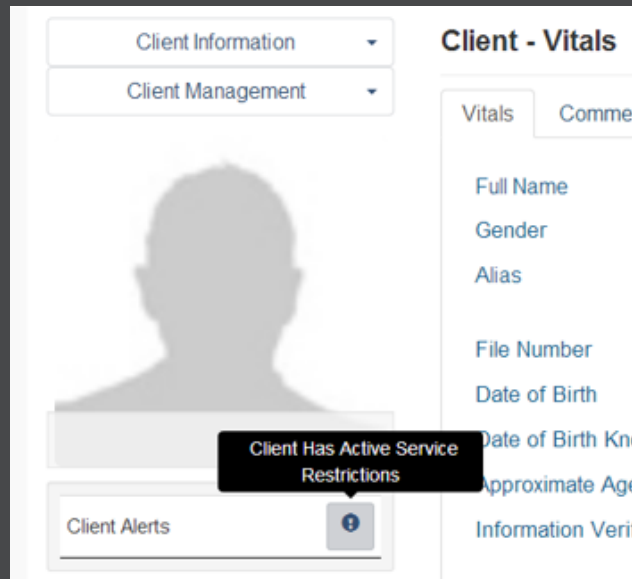
1. Click on the [icon] button in the Client Control Panel

> 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**

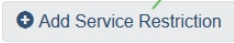▼ Filter: 1 Week(s) ▾ ← **Filter by date**

Filter by text

Show 10 ⌄ entries   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**

⊕ Add Service Restriction   **Edit this Service Restriction**   [1]

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

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**

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

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

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 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

○ Add Turn Away   **○ Add Anonymous Turn Away**

1

Add a Turn Away

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

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

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
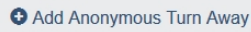
Turn Away List

▼ Filter: All ▾ — Filter by date range

Filter by text

Show 10 ∨ entries   Filter items

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

⊕ Add Turn Away   **⊕ Add Anonymous Turn Away**   Add a new anonymous 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

Add Anonymous Turn Away

Presumed Aboriginal	No
Observed Disability	No
Age Group	Select an option ★
Gender	Select an option ★
Effective Date and Time	
Number of Adults	★
Number of Children	★
Reason for Turn Away	Select an option ★
Requested by	Select an option ★
Referred by	
Referred from	Select an option
Referred to	Select an option
Comments	

💾 Save   ✕ Cancel

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

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