

The following ROI process has been developed to support business continuity in extreme circumstances. Circumstances would include when direct client service delivery is impacted, where it remains possible to continue to serve individuals remotely however you may not be able to see this individual in person. This process can be followed for entry into Coordinated Access and Assessment (CAA) as well as for entry into a Housing First program. The following process is only to be followed/initiated during times that there is system wide recommendation.

The possible processes to follow for continued service delivery are below. The first option is preferable wherever possible:

## CAA – New Entries, Program Transfers, Housing First Graduates

1. Support Services Provider as Witness
  - a. HMIS steps for completing client information, NSQ and/or a Housing Plan for CAA, OR for Housing First Program Transfer Application OR Housing First Graduates remain the same, the witness is a community partner that is in direct contact with the individual (eg. Hospital social worker, outreach team, etc.)
  - b. Ensure that the witness can confirm the individual understands the release of information or program intake documents, signs and dates the form and forwards this to the housing strategist or housing first program to upload on HMIS.

**For CAA entries ONLY** create a program entry once the above step are complete.
2. Verbal Consent or Text Consent is the only available option via telephone
  - a. HMIS steps for completing client information, NSQ and/or a Housing Plan for CAA, OR for Housing First Program Transfer Application OR Housing First Graduates remain the same
  - b. Complete the ROI with the individuals name and date and witness this document. Include with your signature a line indicating that this was given as a verbal consent due to temporary CAA processes for extraordinary situations.
  - c. Upload this as per usual process into HMIS.
  - d. **For CAA** - Add a case note indicating 'CAA ROI consent requires in-person update and signature at next check-in'.
  - e. **For CAA** Add a client note as per the process below indicating 'CAA ROI consent requires in-person update and signature at next check-in'.
  - f. **For Program Entry** – utilize either a case note or client note as per normal program practices.

## Client Notes




This feature is known as the non-confidential pop-up messaging system. By adding a client note on the client profile tab, the next user to open the client profile will receive the message via a pop-up window.

 This should be used to enter non-confidential messages - **do not use it to enter daily case notes or enter confidential information.**

1. Scroll to the bottom of the client profile and click "Add New Client Note"
2. Fill in the Note Date & Message – Be sure to add your name to the note as it does not have it displayed when it pops up again.
3. Click Save

**Note**

**Add a New Client Note - (25) K2R, Test4**






Note Date \*  /  /    


Notes





Client is to contact Dr @ 403-123-4567 before December 1st

Client Notes				
	Provider	Note Date	Note Preview	Full Note
No matches.				
<input type="button" value="Add New Client Note"/>		<input type="button" value="Print"/>		

The client note will pop-up as a message whenever a user opens the client's profile and when the client is selected for ShelterPoint check-in.

-  Note has not been read
-  Note has been read (will no longer pop up)
-  Allows you to edit the note
-  Will delete the note for ALL users
-  Allows you to read the full note

Once the client has been able to sign a CAA ROI or the program intake documents mark the note as "Read" by clicking the  yellow star icon. The icon will turn grey and users will no longer have the message window pop-up when they access the client's profile:

Client Notes				
	Provider	Note Date	Note Preview	Full Note
  	Calgary HMIS	11/14/2014	Client is to contact Dr @ 403-123-4567...	
<input type="button" value="Add New Client Note"/>		<input type="button" value="Print"/>		
Showing 1-1 of 1				

## Program Entries

Verbal Consent or Text Consent is the only available option via telephone

- a. Complete review of intake package with client over the phone along with the name of the individual and the date that it was reviewed with the client and indicate that verbal consent and agreement was made for entry into program.
- b. Upload this as per usual process into HMIS and give the client an entry into program on HMIS.
- c. Add a case note indicating 'Program intake requires in-person update and signature'.
- d. Add a client note, as per the process above, indicating 'Program intake package requires in-person update and signature'.