Homelessness Prevention Call Center Call Point Script/Workflow

Data Elements (Process)

Definition

Step 1: Starting a Call

Data Elements (Process)	Definition
Navigating to the "**Calls**" module 📞 **Calls** ▶	The call module can be found in the navigation panel on the left side of the Home Page Dashboard
Preparing to start a Call. ⓘ If you do not enter search criteria, search results will be limited to the previous seven days worth of data. Search for Call Records by using keywords for Client name, Call ID, or User ID. **Search** [ ] [**Show Advanced Search**] [Search] [Clear] [Start New Call] ☐ Show MY Calls Only	Uncheck "**Show My Calls Only**" and click on Show Advanced Search
Click on "**Start New Call**" – Must press for every call.	"Hello, my name is \<first name\>, with the Homelessness Prevention Call Center at 211 Metro. What is your name?"
Click on the plus sign next to "**This Call Record has not been linked with a Client Record.**" ⊕ This Call Record has not been linked with a Client Record.	Ensures link to Client records and provides enhanced Search screen. Calls must be linked to a new or existing Client record
Search for client record	Limit search to no more than the first three letters of first name and first three letters of last name. Click on 'Search'. While searching, ask, "Have you called our service in the past?" If the answer is no, or the record is not found, read Part 1 of the Client Consent Form. If the caller does

Homelessness Prevention Call Center Call Point Script/Workflow
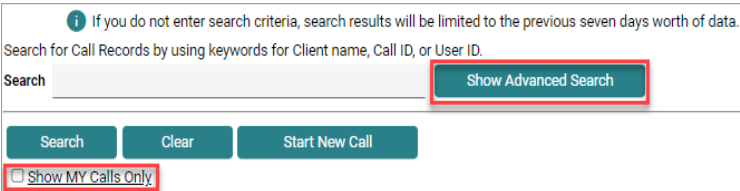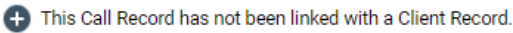
Scripts highlighted in GREEN

Data Elements (Process)

Updated September 2024

Definition

Data Elements (Process)	Definition
Client Search — Please Search the System before adding a New Client. First: test. Name Data Quality: -Select-. Alias. Social Security Number. Social Security Number Data Quality: -Select-. U.S. Military Veteran?: -Select-. Exact Match. [Search] [Clear] [Add New Client With This Information]	not provide consent, the assessment cannot be continued. Explain that their information will not be used for telemarketing. There are no other exceptions to this policy. Seek supervisory help if necessary.
If the **Client Record is not found** [Add New Client With This Information]	"Before I proceed, I need to explain that your information will be entered into the city-wide Homeless Management Information System. The information you provide will be shared with the city and other related homeless service providers to provide you with appropriate services". "If you are a victim of domestic violence, I will hide your information in the computer system." "Are you a victim of domestic violence?" "Do I have your permission to enter your information into the system?"
If the **Client Record is found** **Client Results** ID: 566956 Name: 1, tester	Click on the plus next to the Client ID and Name

2 | P a g e

Data Elements (Process)   **Definition**

Step 2: Release of Information & Record Locking

All clients must have two Releases of Information entries completed. 	This can be done via the Client Information Tab followed by clicking on the tab ROI. You will need to create two separate ROIs in HMIS to document the client's data-sharing preferences. 1. Consent for Data Sharing (A, B or C) 2. Supplemental Client Consent for Sharing of Certain Disability Data and Health Information To begin entering 1 of the 2 ROI. Click on Add Release of Information
  Next, you will need to add another ROI (Supplemental Client Consent)	**Standard Consent**: This information will be shared through HMIS and with members of the Collaborative. • Personal Identifying Information (Name, Social Security Number, Date of Birth, Gender, Veteran Status, photo) • Personal identifying information about your dependents (if applicable) (Note: Anyone 18 years of age or older must sign a separate consent form.) • Enrollment information (may include your past enrollment information) • Recipient Identification Number (if you do not know the number, we will try to look it up) • Contact information Provider: Your agency should be automatically displayed.

Homelessness Prevention Call Center Call Point Script/Workflow

Data Elements (Process) | **Definition**

Release Granted: This is dependent on the Documentation.

Start Date: The day the client signs the form.

End Date: Take the Start Date and add three (3) years. Though the consent form does not have an expiration date, this is required.

Witness: Staff Name

Once all fields are filled, click **Save Release of Information**.

If the caller selects option C in the standard ROI, then no client data should be recorded in HMIS. Please proceed to completing Step 4 - Completing Type of Call Questions.

Once completed you should see two ROI entries added

If the caller is **experiencing domestic violence or selects option B in the standard ROI or Supplemental - Does not agree to share, then you are required to lock that client's file.**

Click on the Lock in the client detail box. If the record should be locked, click on the Red Minus next to the Global visibility name. The lock should then turn RED.

Data Elements (Process) **Definition**

Step 3: Completing HPCC Call Assessment

After completing the Release of Information, navigate back to the Current Call tab to begin completing the HPCC Call Assessment.

Current Call	Previous Calls (3)	Client Information
Caller Profile	ROI	

Client Contact Information

Mailing Address	Ask, "What is your address?" Enter the address in the text field. If they live outside, ask if they can provide an address of where they are moving or use a recent address. If they are moving to a new unit, ask for the address they are moving to.

Data Elements (Process)	Definition
City	If the caller is living outside of Chicago, please proceed to Step 4 - Completing Type of Call Questions to document the termination of the call.
Zip Code (5 digits)	Ask, "What is your current zip code?" Enter the caller's current zip code.
Client Phone Number	Ask, "If I can find a referral or program for your situation, what is the phone number where you can be contacted?" After typing the number, read back and ask for confirmation on accuracy.
Client Email Address	Ask, "Do you have an email address in case they are unable to reach you by phone? ".
Alternate Contact	Ask, "Do you have an alternate number in case they are unable to reach you at the first number? ".

Reason for Call

Caller Consent and Notification	Select the appropriate value to indicate consent. If the caller has selected to share information in HMIS then Yes should be selected unless the caller is Emancipated Minor or has a Power of Attorney, then those options should be chosen. If the caller selected to not share information (ROI - Option C) then data should not be entered into HMIS and should proceed to complete Step 4 - Completing Type of Call Questions
Online Application?	Select Yes or No to indicate if this is an online application.
Reason for calling Reason for Calling _____ G	"Are you calling for rent, security deposit, mortgage, light, gas?" Enter the first letter of the assistance needed (R,S,M,L,G, O(other)). If the caller replies, "Something else", ask, "Please describe what assistance you are seeking." If the caller is not seeking rent, gas, electric, water or security deposit, please proceed to completing Step 4 - Completing Type of Call Questions
Zip code of Last Permanent Address	Ask, "What is the Zip code of your last permanent address? ".
Enrollment CoC	Enrollment CoC will always be IL-510

	Scripts highlighted in GREEN	**Updated September 2024**
Data Elements (Process)		**Definition**

Client Demographics

Date of Birth		
Date of Birth Type	-Select-	G

To make multiple selections, hold the Control (Ctrl) key and left-click each value as necessary. It will display as a blue highlight.

Gender	Woman (Girl, if child) Man (Boy, if child) Culturally Specific Identity (e.g., Two-Spirit) Transgender Non-Binary Questioning Different Identity Client doesn't know Client prefers not to answer Data not collected	G
	Clear All	

Text field below is required when selecting "Different Identity"

If Different Identity, Please Specify		G

To make multiple selections, hold the Control (Ctrl) key and left-click each value as necessary. It will display as a blue highlight.

Race and Ethnicity	American Indian, Alaska Native, or Indigenous Asian or Asian American Black, African American, or African Hispanic/Latina/e/o Middle Eastern or North African Native Hawaiian or Pacific Islander White Client doesn't know Client prefers not to answer Data not collected	G
	Clear All	

Additional Race and Ethnicity Detail		G
U.S. Military Veteran?	-Select-	G
Primary Language Spoken	-Select-	G
Number of household members under 18		G
Number of household members 18 & over		G

Date of Birth	Full DOB Reported (HUD) Approximate or Partial DOB Reported (HUD) Client doesn't know (HUD) Client prefers not to answer (HUD) Data not collected (HUD)	Ask, "What is your date of birth?". If the caller refuses to provide DOB, ask "Are you over 18?". If the answer is "No", do not proceed and contact the Supervisor. **Required**
Date of Birth Type		Choose an appropriate answer based on the caller's disclosure. **Required**.
Gender		Ask, "What is your gender?". The Gender section is multi-select, left click values as necessary. If Different Identity is selected the following question must be completed. **Required**
If Different Identity, Please Specify		If a Different Identity is selected for Gender, document the identity in the text field.
Race and Ethnicity		Ask, "What is your race or ethnicity?". If the caller provides something other, read the available list and ask them to choose. This must be caller-stated, not Specialist-defined. The Race and Ethnicity section is multi-select, left click values as necessary.
US Military Veteran		Ask, "Are you a veteran?".

Data Elements (Process)	Definition
Primary language spoken	Ask, "What is the primary language spoken in your home?" Choose the caller's preferred language. **Required.**
Number of household members under 18	Ask, "How many in your household are younger than 18?". **Required**.
Number of household members 18 & over	Ask, "How many in your household, including yourself, are 18 and over?". **Required**.
Medical Insurance	Ask, "Do you have medical insurance?". **Required**.

Income and Expenses

Source of Current Income Located in the **Household Income (HPCC) Sub-assessment.**	"Now I am going to ask about your monthly income and expenses since many of the programs require that you can pay your own bills after an award is given." "What type of monthly income do you have and how much?" Enter the amount and type for each income source.

Data Elements (Process)	Definition
Total Monthly Income	Add the income amount available to the caller to pay their monthly bills. If they do not receive any income enter "0". **Required.**
AMI Level	Using the AMI chart based on household size and income (adjust for gross), select the appropriate AMI. **Required**.

Household Expenses

Monthly Rent	_____ G
Mortgage (monthly)	_____ G
Subsidized Housing	-Select- ▾ G
Monthly Gas (heat)	_____ G
Monthly Gas (cooking)	_____ G
Monthly Electric	_____ G
Water (monthly)	_____ G
Other (1)	_____ G
Other (2)	_____ G
Explain Other	_____ G
Total Monthly Expenses	_____ G
Has previous assistance been given?	-Select- ▾ G
Explanation-previous assistance	_____ G

Data Elements (Process)	Definition
Monthly Rent/Mortgage	Ask, "How much is the monthly rent or mortgage?" If the caller has not yet located a place, please enter the estimated amount. Ask the caller or help them estimate. **Required.**
Subsidized Housing?	Ask, "Do you have a subsidy to help you pay your monthly rent?" Record the caller's answer. **Required**.
Monthly Gas (heat) And **Monthly Gas (cooking)**	Ask "Do you have to pay for gas heat?". If the caller answers, "Yes", ask, "How much is your average gas bill per month?" If the caller isn't sure, ask for the highest bill of the winter and the lowest of the summer, then take the average. If heat is included, write "0". If the caller has not yet located a place, please enter the estimated amount. **Required**.

If disclosed, enter cooking gas. |

Homelessness Prevention Call Center Call Point Script/Workflow

Data Elements (Process)	Definition
Monthly Electric	Ask "How much is your average electric bill per month?" If the caller isn't sure, ask for the highest bill of the summer and the lowest of the winter, then take the average. If electricity is included, write "0". **Required**.
Other Expense	If the caller mentions any other recurring payments such as child support, mandated creditors, etc., place the monthly amount here.
Explain Other Expense	Write the type of the other recurring payments here.
Total Monthly Expenses	Add monthly expenses together. If they do not have any monthly expenses enter "0"; **Required**.
Has Previous assistance been given?	Ask, "Have you had financial assistance from any agency in the past?" Select "Yes" or "No". **Required**.
Explanation previous assistance	If the caller answered, "Yes" in the previous question, record who, what, when, and amount. **Required**, if previous question = "Yes".

Need Assessment

Current Needs:

Rent Need	_____ G
Document of Risk (R)	-Select- ⌄ G
Security Deposit	_____ G
Document of Risk (S)	-Select- ⌄ G
Gas	_____ G
Document of Risk (G)	-Select- ⌄ G
Contacted (G)	-Select- ⌄ G
Electric	_____ G
Document of Risk (E)	-Select- ⌄ G
Contacted (E)	-Select- ⌄ G
Mortgage	_____ G
Document of Risk (M)	-Select- ⌄ G
Contacted (M)	-Select- ⌄ G
Gas (cooking) bill assistance	_____ G
Document of Risk (GC)	-Select- ⌄ G

Need Type (complete based on caller need)	Complete the type of need assistance the caller disclosed.
Amount *Example of help text in HMIS* Mortgage _____ G Document of Risk (M) -Select- ⌄ G *Do they have a statement from bank stating they are behind? Required if behind on mortgage.* Contacted (...)	If the request is utility, ask, "How much do you need to avoid disconnection or reconnection?" If the request is rent, ask, "How much do you need to avoid eviction?". If the request is a security deposit, ask, "How much do you need for the security deposit?" For each type of need, review the help text in HMIS with the caller to ensure they have the relevant documentation of their need.

If the caller asked for rent/security deposit, ask "Are you up to date on your gas bill?" and "Are you up to date on your electric bill?" If the caller asked for utility-only, make sure to find out if they are up to date on housing (rent/mortgage). Enter any amount threatening their housing stability.

Data Elements (Process)	Definition
Document of Risk	Select Yes if they have or can get documentation stating their housing is threatened. **Caution the caller about asking for a 5-day notice, instead suggest they ask the landlord for a letter stating they are behind, payment is needed, and their housing is threatened.** Required for each Type entered. Proof includes a text message, email, or notice stating they are currently behind. The caller is not required to have an eviction notice.
Contacted	If asking for Utility assistance, ask, "Have you contacted CEDA?". If the answer is yes, choose CEDA. If the answer is no, leave it blank. **Required**.
Foreclosure	Ask, "Have you been affected by foreclosure?" If the caller's reason for needing assistance is due to foreclosure, select "Y"; if not, select "N"; **Required**.

Date Client Received SHPF	This question is only completed by All Chicago staff and should be left blank when completing the assessment.

Data Elements (Process)   **Definition**

Referrals for Call

Referrals for this Call:	
Reason applying for assistance	-Select- G
Reason applying for assistance - 2	-Select- G
Reason applying for assistance - 3	-Select- G
Explanation-applying	
Prior Living Situation	-Select-
Length of Stay in Previous Place	-Select- G
Ineligible Reason	-Select- G
Ineligible Reason - 2	-Select- G
Ineligible Reason - 3	-Select- G
Ineligible Reason - 4	-Select- G
Referral Made to:	-Select-
Referral Amount	G
Caller Contribution	G
Referral made to - 2:	-Select-
Referral made to - 3:	-Select-
Referral made to - 4:	-Select-
Referral made to - 5:	-Select-

Reason for applying for assistance	Ask, "What is the reason you fell behind/couldn't pay, or what happened to cause your need?" Select the reason most eligible for a referral. Use this data element for the reason most closely related to eligibility. **Required.**
Reason for applying for assistance - 2 **Reason for applying for assistance - 3**	Select any additional reasons stated by the caller.
Explanation-applying	Enter the date and your initials in the note section. Record any comments, or details gathered from the caller regarding your assessment of their eligibility; do not repeat information already recorded in the other screen elements. Not required if the entire assessment can be determined from entered data, helpful for dates, answers to eligibility determination questions, etc. If the caller disclosed self as DV, do not write any location information. Lock profile

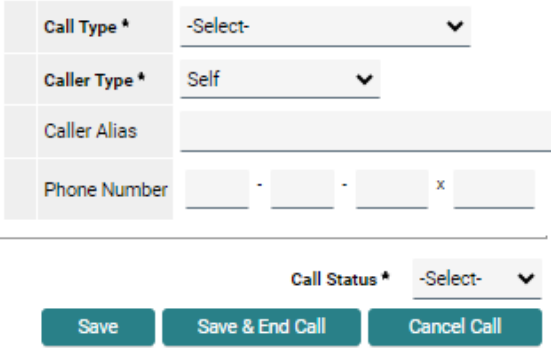# Homelessness Prevention Call Center Call Point Script/Workflow

Data Elements (Process)	Definition
Prior Living Situation -Select- ----- HOMELESS SITUATIONS ----- Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train Emergency shelter, including hotel or motel paid for with emergency shelter vou Safe Haven (HUD) ----- INSTITUTIONAL SITUATIONS ----- Foster care home or foster care group home (HUD) Hospital or other residential non-psychiatric medical facility (HUD) Jail, prison, or juvenile detention facility (HUD) Long-term care facility or nursing home (HUD) Psychiatric hospital or other psychiatric facility (HUD) Substance abuse treatment facility or detox center (HUD) ----- TEMPORARY HOUSING SITUATIONS ----- Transitional housing for homeless persons (including homeless youth) (HUD) Residential project or halfway house with no homeless criteria (HUD) Hotel or motel paid for without emergency shelter voucher (HUD) Host Home (non-crisis) (HUD) Staying or living in a friend's room, apartment, or house (HUD) Staying or living in a family member's room, apartment, or house (HUD) ----- PERMANENT HOUSING SITUATIONS -----	Indicate where the caller lives/stays based on discussion; **Required**. If you need to inquire, please ask, "Where do/did you live" or "Where did you stay last night?"
Length of Stay -Select- One night or less Two to six nights One week or more, but less than one month One month or more, but less than 90 days 90 days or more, but less than one year One year or longer Client doesn't know Client prefers not to answer Data not collected	Ask, "How long have you lived in your current placement" or "How long did you live in the previous place?".
Ineligible Reasons	If the call outcome is "Ineligible", select (and add) all reasons why the caller did not receive the referral. Refer to 211.
Referral Made to	If the caller is eligible for financial assistance, check Referral Logs for any available referral; select referral agency for State HF Funds for financial assistance over $300 for rent, lights, gas, mortgage, or security deposit. For ineligible callers or other needs such as furniture, utility-only assistance or, non-financial assistance, advise the caller to contact 211 Metro Chicago.
Caller Contribution	If the caller can pay part of the amount needed, enter here. If they are referred and are not contributing, then enter '0'. If the referral is made this is **Required**.
Referral Amount	If the referral is for financial assistance, enter the referral amount; leave it blank if not applicable. The referral amount should not be more than the fund cap of 6 months of rent/mortgage and $5000 total. Note: Referral amount (if entered) should = Total amount of above debt - Caller Contribution
**Scroll to the BOTTOM of the assessment screen and Click Save.** **Next, Complete Step 4: Type of Call Questions**

Scripts highlighted in GREEN   Updated September 2024
Data Elements (Process)   **Definition**

Step 4: Completing Type of Call Questions

Data Elements (Process)	Definition
	Call Type, Caller Type and Call Status can all be found at the top of the call screen. Located under Current Call Tab Call Type Caller Type Located top right corner of the call screen. Call Status
If the assessment was COMPLETED	Choose the appropriate call outcome. Outcome determination should be based on the referral most likely to match the request. Seek Supervisor assistance if necessary. Enter one outcome per call. **Required**. Call Type = (select appropriate outcome) This is likely: Eligible or Eligible, No Funds. Caller Type = Self Call Status = Complete
If option C was selected in the standard ROI	If the caller selects option C in the standard ROI, then no client data should be recorded in HMIS. Please let the caller know that choosing option C will result in no data being entered into HMIS and referrals cannot be made for State HP and conclude the call. Call Type = Ineligible Caller Type = Self Call Status = Incomplete
If NOT seeking rent, gas, electric, water, or security deposit	If the caller is not seeking rent, gas, electric, water or security deposit, please let the caller know they are not eligible for State HP. Please select the call type as ineligible and conclude the call. Call Type = Ineligible Caller Type = Self Call Status = Incomplete
If client is outside of Chicago	If the caller is outside of Chicago, please let them know they ae not eligible for State HP. If the caller is within Suburban Cook County, please ask the caller if they would like the phone number or to be transferred to the Suburban Cook County team. Please select the call type as Errant Call – outside of service area and conclude the call. Call Type = Errant Call – Out of Service Area Caller Type = Self Call Status = Incomplete

Data Elements (Process)	Definition

Step 6: Referral to Homelessness Prevention Project

This step is only required if the HPCC assessment indicates a referral would be made. If the caller did not consent, was deemed ineligible or was outside of Chicago, no referral should be made.

Data Elements (Process)	Definition
Add Referral	Add Homeless Prevention referral by clicking **Add Referral** at the top of the Call page
	For those who are receiving a financial referral over $300 for rent, lights, gas, mortgage, or security deposit. Add a need that reflects the caller's request (i.e., Rental Payment Assistance). Only one needs to be selected per client record. Once selected click **Add Terms**
	After referring to the excel spreadsheet for available HP providers, select the provider from the Referral Provider Quicklist. Once selected click **Add Provider**

Data Elements (Process)   **Definition**

Next, ensure that the Service selected from the Service Code Quicklist has a check in the box under Referrals. If the check is not added the referral will not be created

Finally, complete the Need Status and Outcome questions.

Needs Status: Identified
Outcome: Service Pending

Once complete **Click SAVE ALL.** Choosing anything else will not result in a referral being created

Notes: Let the client know that a referral has been provided and to expect a call from the agency within 10 business days. If they have not heard back from an agency after 10 full business days, they may call back the HPCC line to request updates. If a client is eligible and referrals are exhausted, advise the client to call back early next week to be assigned to an agency. Offer 211 Metro Chicago as a backup resource in the meantime. For ineligible clients or other needs such as furniture, utility-only assistance, or non-financial assistance, advise the caller to contact 211 Metro Chicago or ask if they would like to be transferred directly.