Homelessness Prevention Call Center Call Point Script/Workflow

Scripts highlighted in GREEN

Updated June 2026

Data Elements (Process) **Definition**

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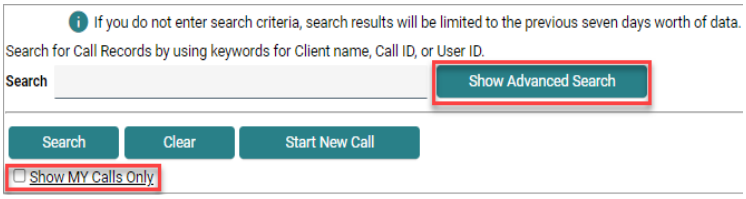
Step 1: Starting a Call

Navigating to the "**Calls**" module 	The call module can be found in the navigation panel on the left side of the Home Page Dashboard
Preparing to start a Call. 	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

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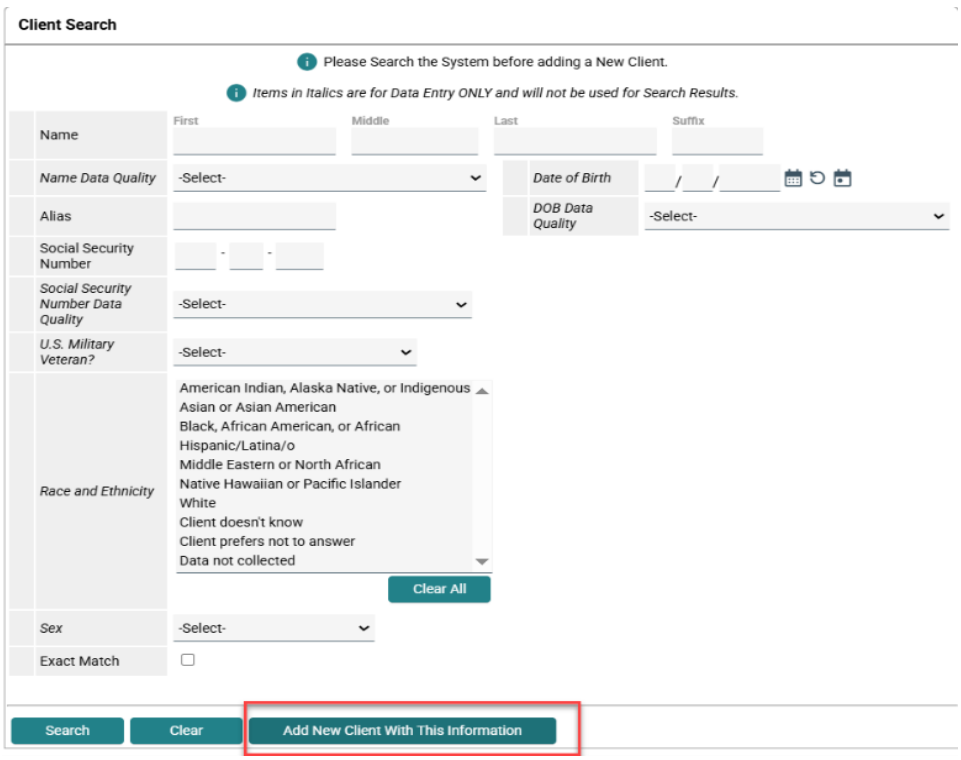
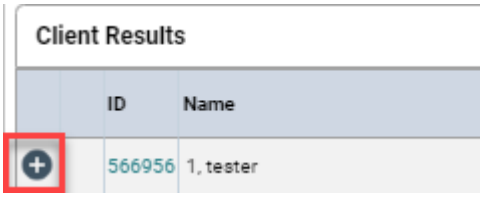
 If the **Client Record is not found** 	the answer is no, or the record is not found, read Part 1 of the Client Consent Form. If the caller does not provide consent, the assessment cannot be continued. Explain that their information will not be used for telemarketing. There are no other exceptions to this policy. Seek supervisory help if necessary. "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** 	Click on the plus next to the Client ID and Name

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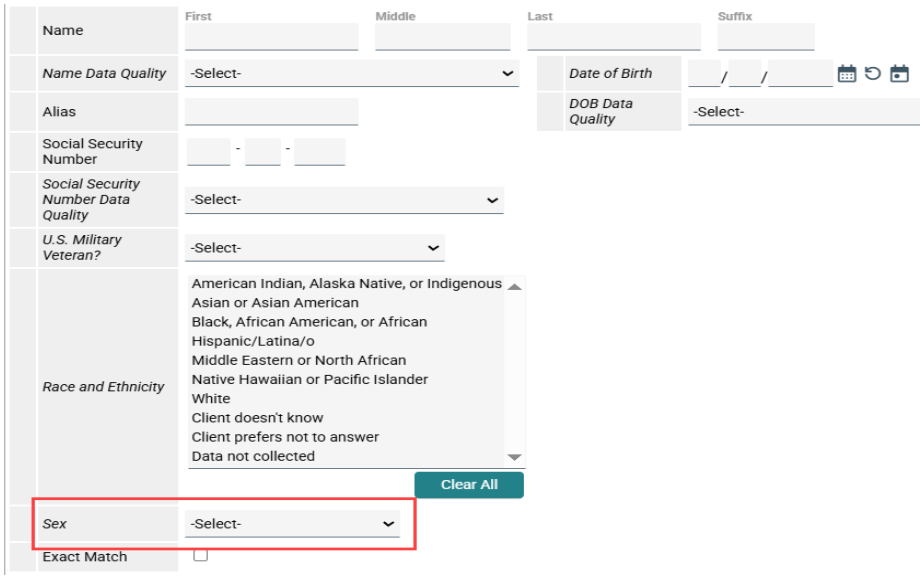
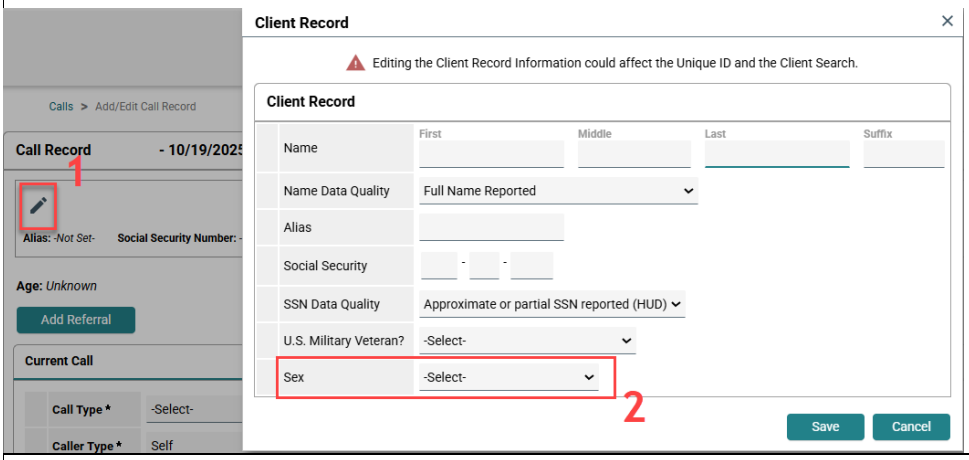
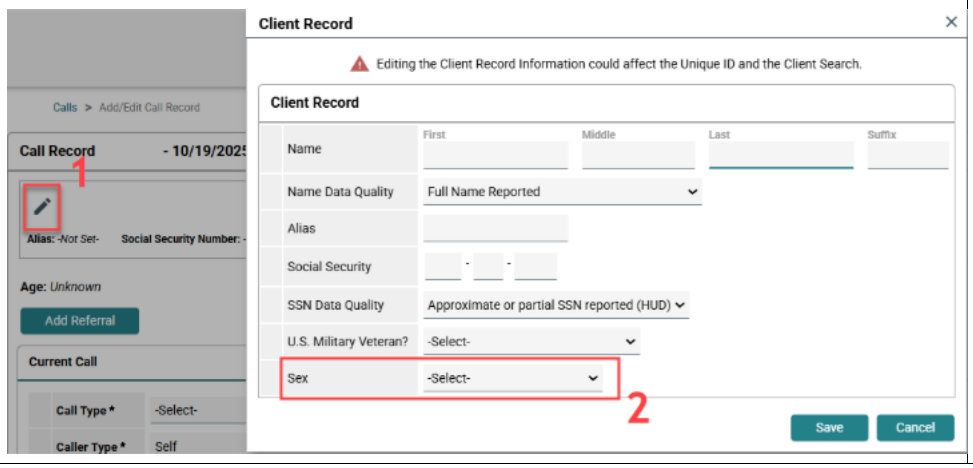
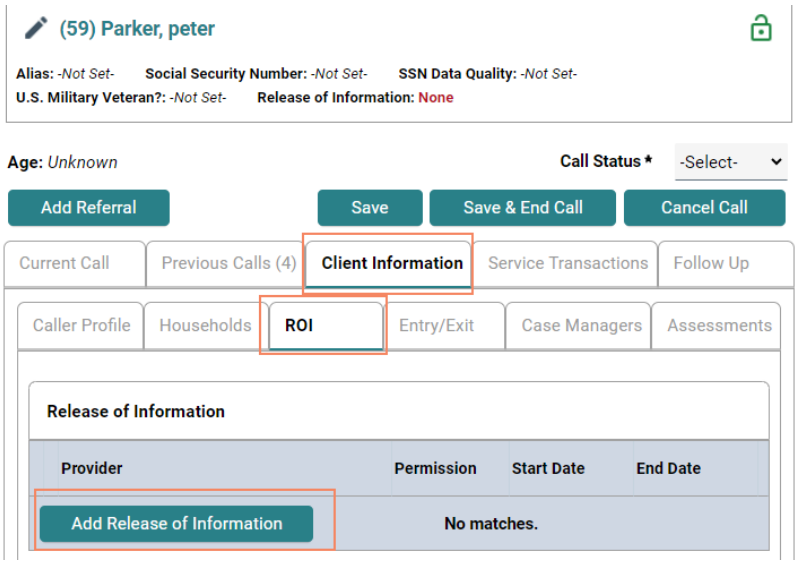
Sex question must be completed at the time of client creation or by editing the client record for existing clients. Required Question If the **Client Record is not found**  If the **Client Record is found**  	**New Record** When creating a new client record for a client who does not have an existing HMIS record, you will need to complete the Sex question at this time. Once completed, you can continue by clicking **Adding New Client With This Information** **Existing Record** If the client already has an HMIS ID, you need to complete the Sex question in the Call Module after selecting the client ID. Once on the Call screen, you can **click on the pencil** next to the clients ID number and name to edit the **Client Record** "I need to ask a question about your sex assigned at birth, which means the sex listed on your birth certificate. The options are male or female. What sex were you assigned at birth?" Staff Note (do not read aloud): If the client says they don't know or prefers not to disclose, please select "Client doesn't know" or "Client prefers not to answer" in the system.
Name Data Quality Full Name Reported Partial, Street Name, or Code Name Reported Client Doesn't Know Client prefers not to answer Data Not Collected	Choose an appropriate answer based on the caller's disclosure. **Required.**

Data Elements (Process)	Definition
Social Security **SSN Data Quality** Full SSN Reported (HUD) Approximate or partial SSN reported (HUD) Client doesn't know (HUD) Client prefers not to answer (HUD) Data not collected (HUD)	Choose an appropriate answer based on the caller's disclosure. If the caller does not have a SSN, select "Client Doesn't Know" **Required**.
US Military Veteran	
Sex 	"I need to ask a question about your sex assigned at birth, which means the sex listed on your birth certificate. The options are male or female. What sex were you assigned at birth?" Staff Note (do not read aloud): If the client says they don't know or prefers not to disclose, please select "Client doesn't know" or "Client prefers not to answer" in the system.

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 one ROI in HMIS to document the client's data-sharing preferences. **Client Consent for Data Sharing** - Full Sharing - Limited Sharing - No Sharing To begin entering the ROI. Click on Add Release of Information

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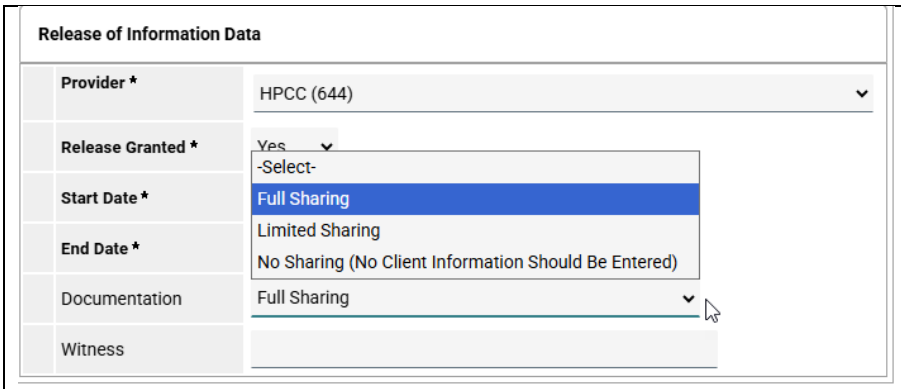 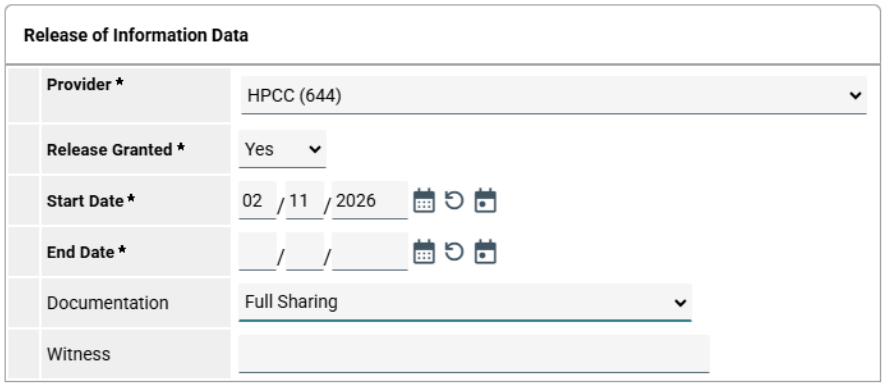	**Consent For Data Sharing**: This information will be shared through HMIS and with members of the Collaborative for client that chooses Full Sharing. • Personal Identifying Information (Name, Social Security Number, Date of Birth, Gender, Veteran Status, photo) • Personal identifying information about 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.

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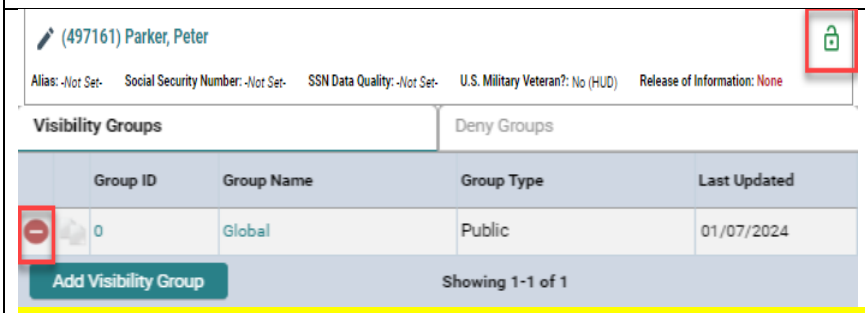
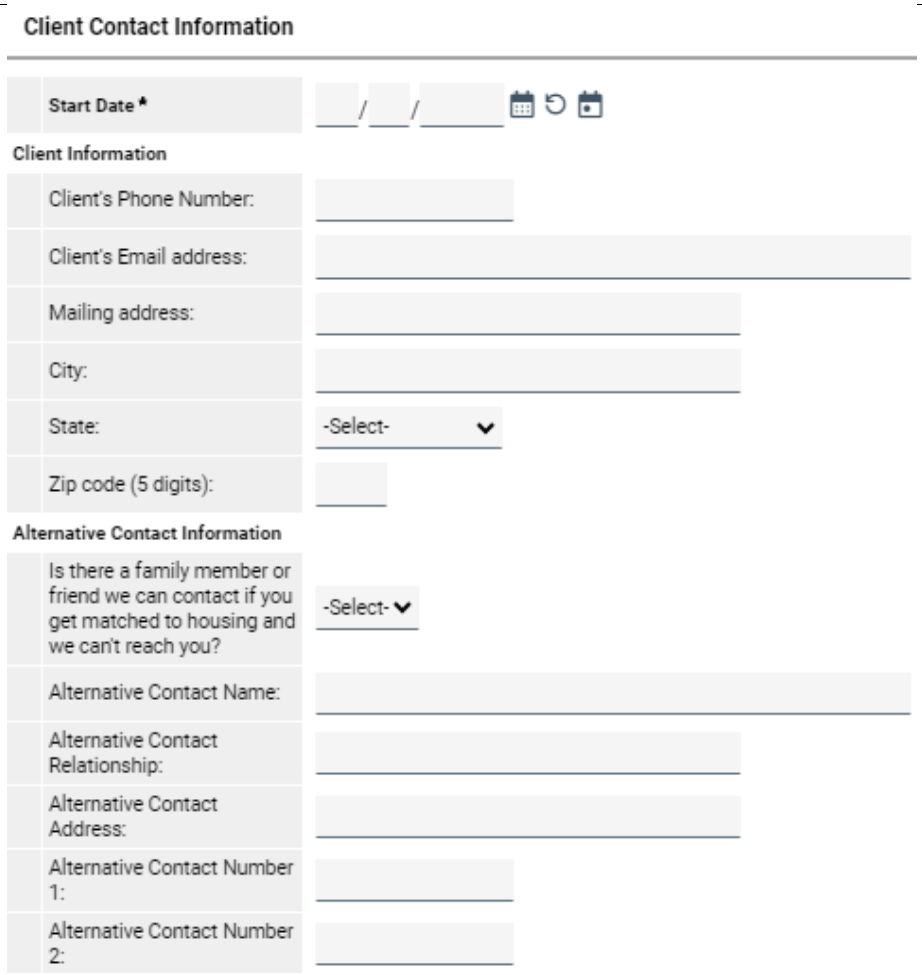
Data Elements (Process)	Definition
<table><tr><th>Documentation</th><th>Release Granted</th></tr><tr><td>Full Sharing</td><td rowspan="2">YES</td></tr><tr><td>Limited Sharing</td></tr><tr><td>No Sharing</td><td>NO</td></tr></table> Save Release of Information Cancel **Release of Information** <table><tr><th></th><th>Provider</th><th>Permission</th><th>Start Date</th><th>End Date</th></tr><tr><td></td><td>HPCC</td><td>Yes</td><td>02/11/2026</td><td>02/11/2029</td></tr></table>Add ROI Showing 1-1 of 1	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 **NO Sharing** 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 the ROI entry 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.

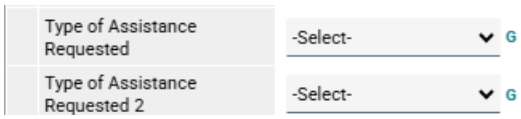
Client Contact Information



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.
City	If caller is living outside of Chicago, please proceed to Step 4 - Completing Type of Call Questions to document termination of the call.
Zip Code (5 digits)	Ask, "What is your current zip code?" Enter the caller current zip code.

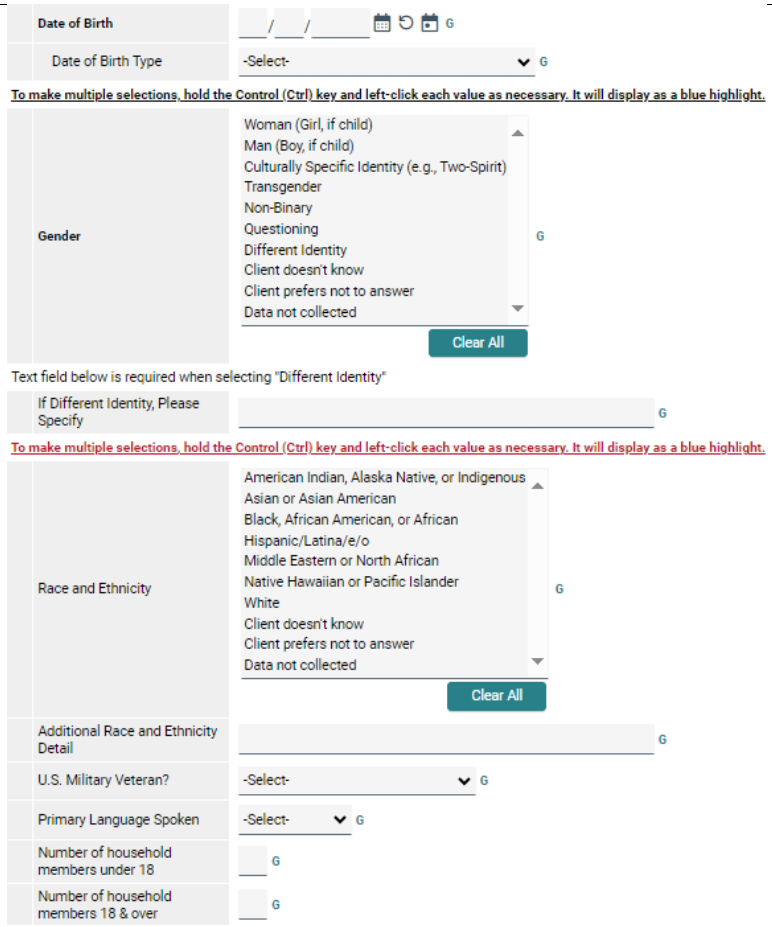
Data Elements (Process)	Definition
	If the caller lives outside of the target community areas please proceed to Step 4 - Completing Type of Call Questions to document the termination of the call.
Client Phone Number	Ask, "If I can find a referral or program for your situation, what is the phone number 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 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 completing Step 4 - Completing Type of Call Questions
Type of Assistance Requested 	"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." Callers may request more than one type of support, such as first month's rent and security deposit. 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

Data Elements (Process)	Definition

Client Demographics



Relationship to Head of Household	The answer should always be "Self". Since the assessment will only be completed by the Head of Household, "Self" should be selected.
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 Different Identity is selected for Gender, document the identity in the text field.

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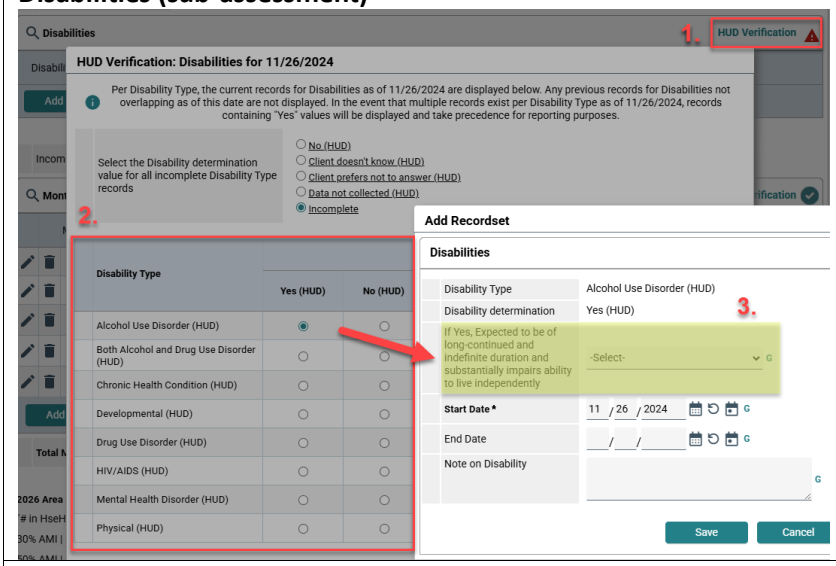
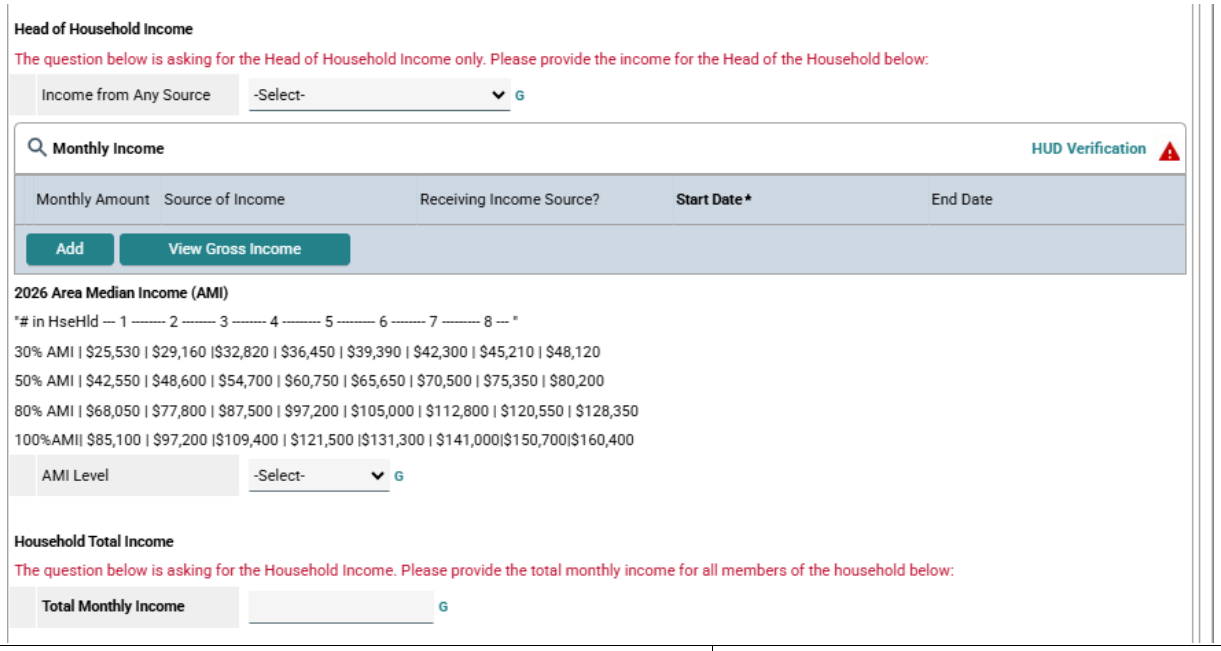
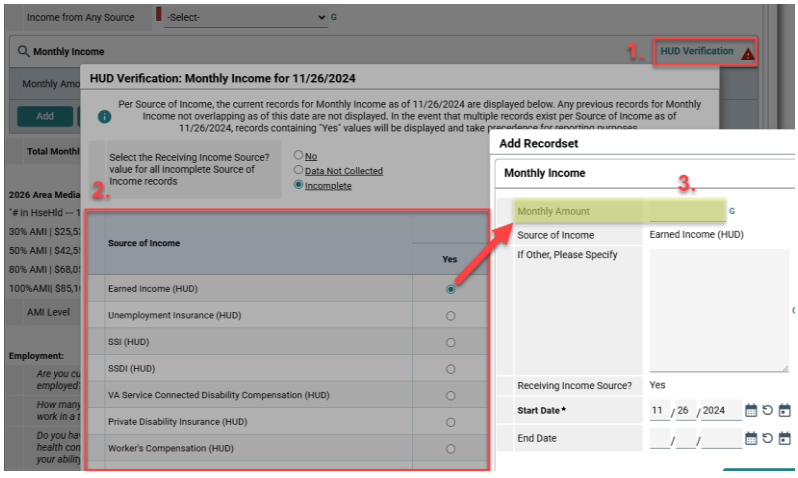
Data Elements (Process)	Definition
Race and Ethnicity	Ask, "What is your race or ethnicity?". If the caller provides something other, read the available list and ask them to choose. This must be caller-stated, not Specialist-defined. The Race and Ethnicity section is multi-select, left click values as necessary.
US Military Veteran	Ask, "Are you a veteran?".
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**.
Does the client have a disabling condition?	Ask, "Do you have any disabling conditions?". **Required**.
Disabilities (sub-assessment) 	1. Click the **HUD Verification** button on the top-right of the disabilities sub-assessment. 2. Indicate whether the caller reports having any of the listed disabilities. 3. If yes, fill out the additional disability information and save.
Medical Insurance	Ask, "Do you have medical insurance?". **Required**.

Data Elements (Process)	Definition

Income and Expenses



Income from Any Source	Ask, "Do you receive income from any source?". **Required**.
Source of Current Income Located in the **Monthly Income Sub-assessment.** 	This Sub-assessment is asking for the Head of Household Income only. "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?" 1. Use the **HUD Verification** button on the top-right of the income sub-assessment. 2. Indicate whether the HoH receives each income type. 3. If yes, enter the monthly amount received from the source.
AMI Level	Using the AMI chart based on household size and income (adjust for gross), select the appropriate AMI. **Required**.

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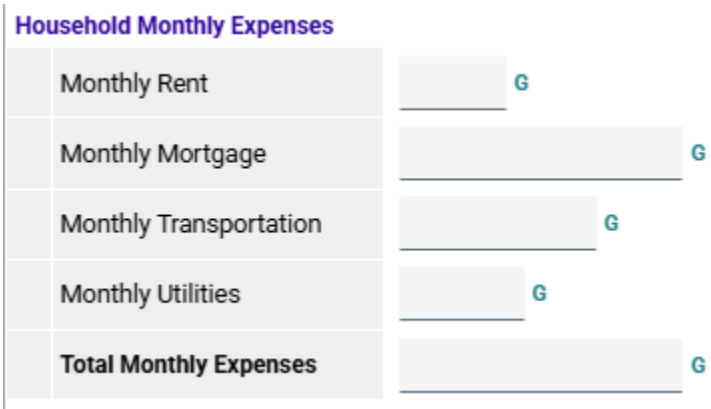
Household Total Income **Total Monthly Income**	Add the income amount available to the caller to pay their monthly bills. If they do not receive any income enter "0". **Required.** **This question is asking for the total income of the Household. This would be the total income of all Household members.**
Household monthly expenses  Household Monthly Expenses Monthly Rent G Monthly Mortgage G Monthly Transportation G Monthly Utilities G **Total Monthly Expenses** G	
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.**
Monthly Transportation	Ask "How much do you usually spend in a month on transportation to get where you need to go?" If the caller is unsure, ask, "How do you usually get around?" and use the following prompting questions. Car: "How much do you typically spend in a month on a car payment, insurance, parking, and gas?" Public transit: "How much do you typically spend on bus/train tickets in a month?"
Monthly Utilities	Ask "Do you have to pay for gas heat? What about electricity?". If the caller answers, "Yes", ask, "How much is your average gas bill per month? And your electricity bill?" 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**. Add other utility expenses to this total as well, such as cooking gas or internet.
Total Monthly Expenses	Add monthly expenses together. If they do not have any monthly expenses enter "0"; **Required**.

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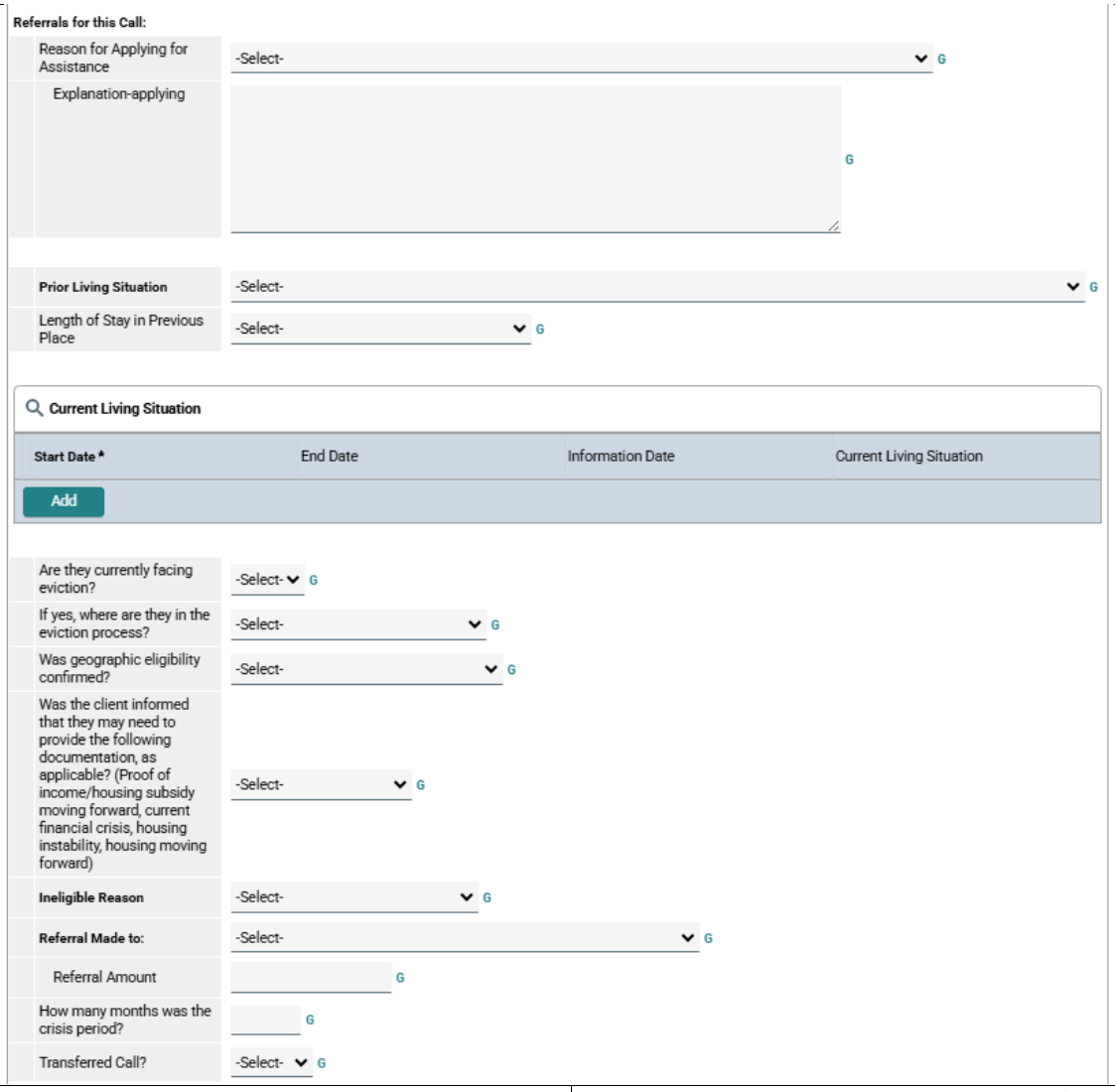
Referrals for this Call



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.**
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

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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?"
Subsidized Housing?	Ask, "Do you have a subsidy to help you pay your monthly rent?" Record the caller's answer. **Required**.
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?".
Are they currently facing eviction?	Ask, "Did you recently receive a written eviction notice from your landlord?"
If yes, where are they in the eviction process?	Ask, "Where are you in the eviction process? Do you have an upcoming court date or have you already had one?"
Was geographic eligibility confirmed?	Do not read aloud. Confirm the caller is living in an eligible community area. Zip code criteria is waived for household experiencing homelessness.
Was the client informed that they may need to provide the following documentation, as applicable? (Proof of income/housing subsidy moving forward, current financial crisis, housing instability, housing moving forward)	If moving forward with a referral, say, "Based on the information provided, you may be eligible to receive financial assistance. The next step is a referral to a provider agency who will help you submit an application. You will need to provide documentation of income, housing, and the financial crisis you described on this call. This referral does not mean you are approved for funding."
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,

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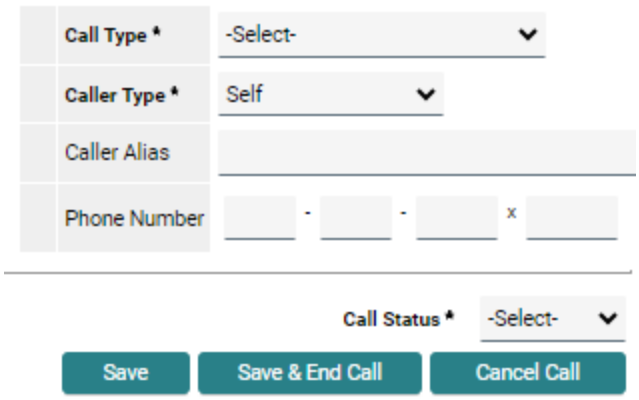
	utility-only assistance, or non-financial assistance, advise the caller to contact 211 Metro Chicago.
Amount	If the request is utility, ask, "How much do you need to avoid disconnection or reconnection?" If the request is rent, ask, "How much do you need to avoid eviction?". If the request is a security deposit, ask, "How much do you need for the security deposit?" For other types of requests, **enter the amount directly threatening their housing stability.** The referral amount should not be more than the fund cap of 6 months of the arrearage.
How many months was the crisis period?	Ask, "How many months are you behind on the bill (rent, mortgage, utility, etc.?" The referral amount should not be more than the fund cap of 6 months of the arrearage.
Transferred call?	Select appropriate outcome.

Step 4: Completing Type of Call Questions

	**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

Data Elements (Process)	Definition
	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 eligible Chicago community area	If the caller is outside of the designated community areas within the city, please let them know they are not eligible for Homeless Prevention. If in Chicago and outside of eligible community area, they can visit a DFSS service center or call 211 for alternative resources. 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 or the designated community areas within the city, please let them know they are not eligible for Homeless Prevention. 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. If in Chicago and outside of eligible community area, they can visit a DFSS service center or call 211 for alternative resources. 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

Step 5: Entry/Exit Enrollment

This step is only required for all HPCC assessments that were completed. If the caller did not consent, was deemed ineligible or was outside of Chicago, steps 5 and 6 are not required.

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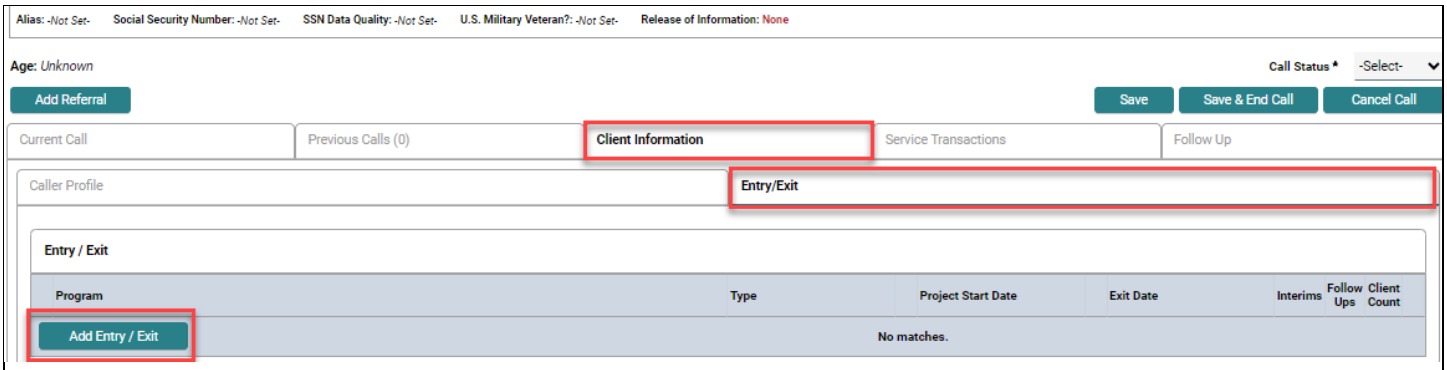
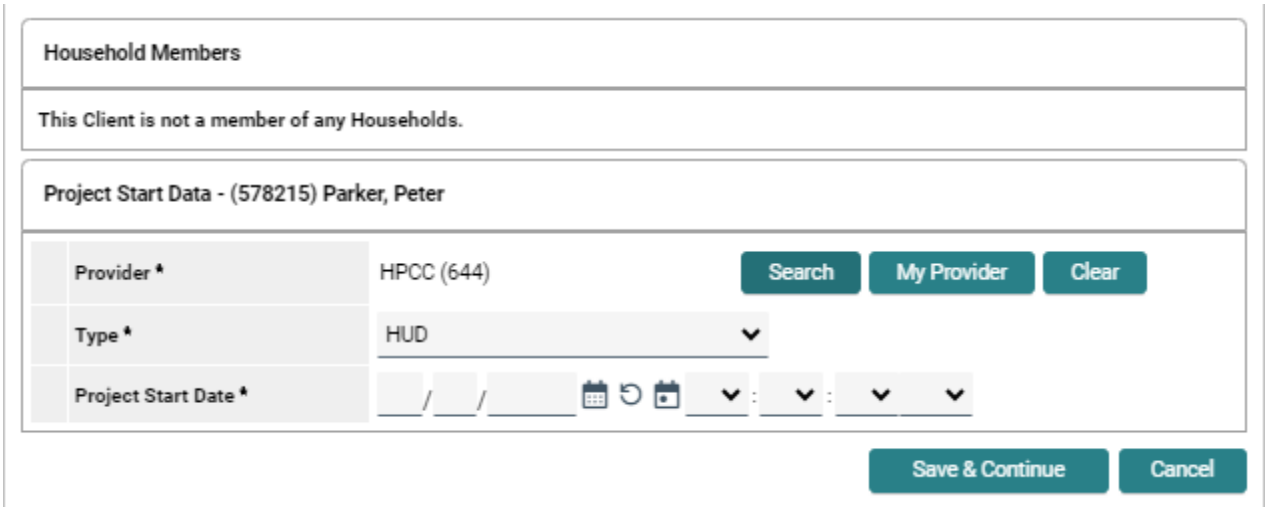
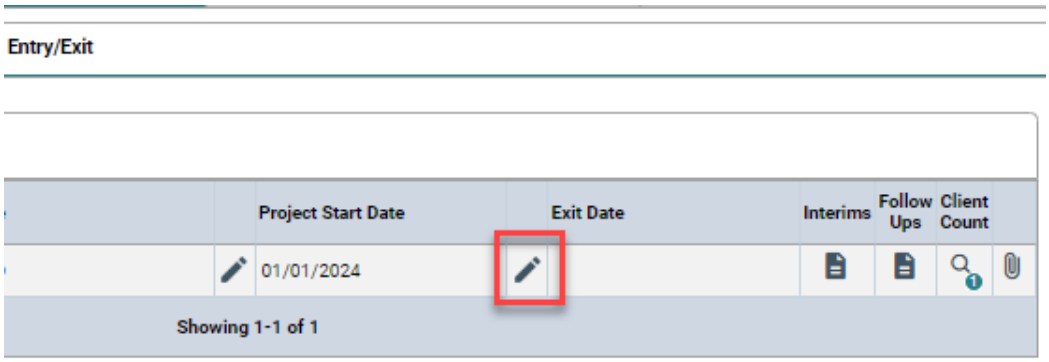
Data Elements (Process)	Definition



Location	Enrollment can be completed by navigating to the **Client Information Tab** followed by the **Entry/Exit tab**. Click **Add Entry/Exit**



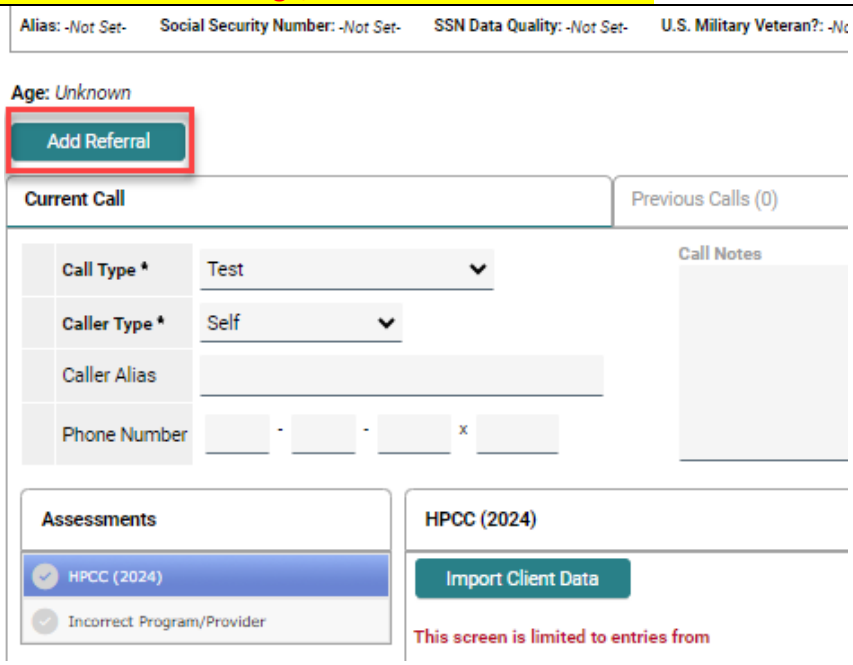
The Provider should be **HPCC (644)**. The Type should be marked as **HUD**. The Project Start Date should be the date of the call.

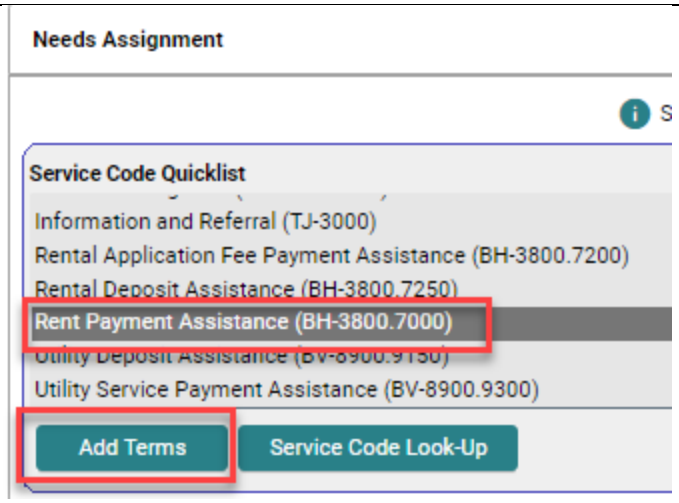
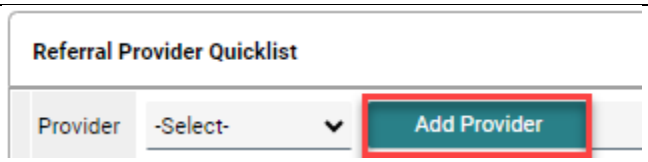


Click on the Exit Date pencil to Exit the caller from the project. Please note: The caller's destination should be where the caller will stay tonight.

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.



Add Referral	Add Homeless Prevention referral by clicking **Add Referral** at the top of the Call page
	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**

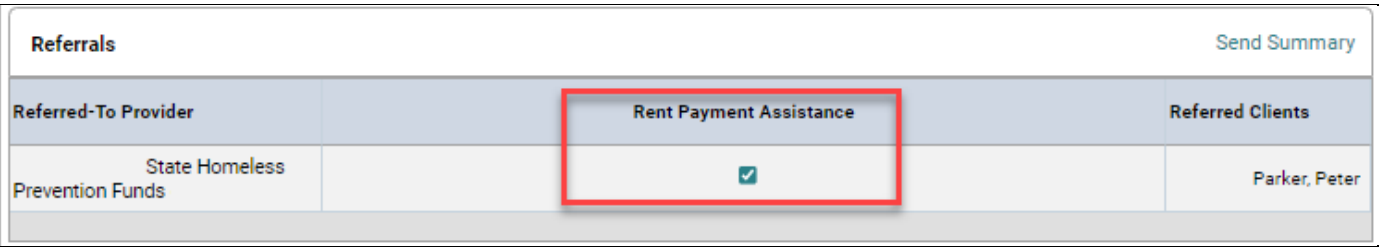
Next, ensure that the Service selected from the Service Code Quicklist has a check in the box under Referrals. If the check is not added the referral will not be created

Homelessness Prevention Call Center Call Point Script/Workflow

Scripts highlighted in GREEN

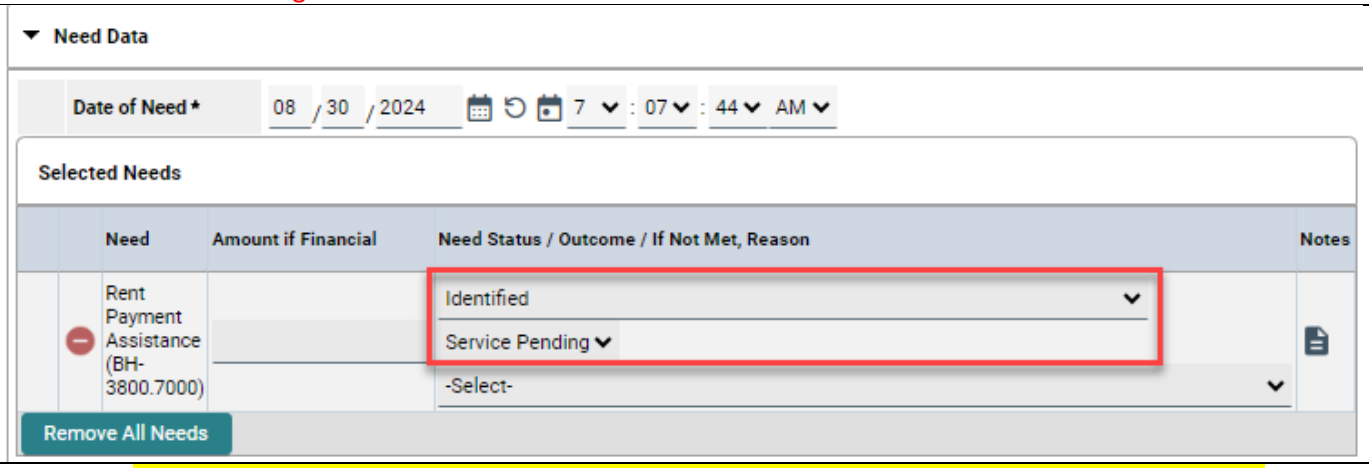
Updated June 2026

Data Elements (Process) **Definition**



Finally, complete the Need Status and Outcome questions.

Needs Status: Identified
Outcome: Serivce 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. Reiterate that a referral does not mean they have already submitted a referral or been approved for funding. 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.