Homelessness Prevention Call Center Call Point Script/Workflow

Scripts highlighted in GREEN | Updated November 2026

Data Elements (Process) | **Definition**

Table of Contents

Step 1: Starting a Call 1

Step 2: Release of Information & Record Locking 5

Step 3: Completing HPCC Call Assessment 7

Client Contact Information 7

Reason for Call 8

Client Demographics 9

Income and Expenses 11

Program Information 14

Step 4: Completing Type of Call Questions 18

Step 5: Referral to Homelessness Prevention Project 20

Step 6: Entry/Exit Enrollment 22

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

Before <u>any</u> information is entered in the HMIS, callers <u>must</u> provide consent to share their information with providers within the Continuum of Care (CoC).

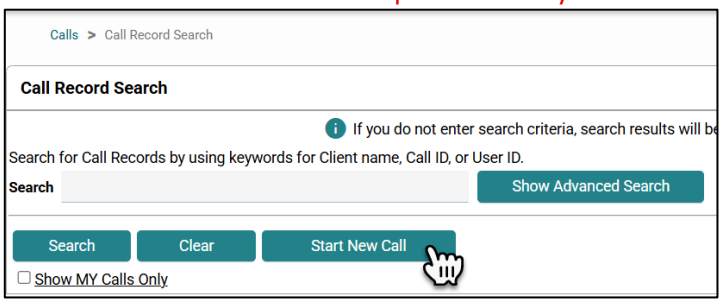
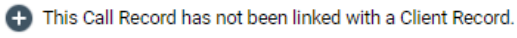
Before I proceed, I need to explain that your information will be entered into the city-wide Homeless Management Information System.

- The information you provide will be shared with the city and other related homeless service providers to provide you with appropriate services and support the community's ability to understand and improve the homeless system.
- You may change or revoke your consent at any time, although changes only apply moving forward and disclosed information may not be removed from the system.
- You may skip questions at anytime, but understand that it may make it more difficult to determine which services you may be eligible for.

Provide the caller with a brief explanation of their options:

You have the following sharing options:

1. **Full Sharing:** This option shares your information to all organizations in the community that uses the HMIS.
2. **Limited Sharing:** This option locks your record and shares your information only with the Homeless Prevention providers, Coordinated Entry team, and the system administrators. Please note that a locked record may cause

Data Elements (Process)	Definition
delays in coordination of care since you may need to provide your information again to future service providers. 3. **No Sharing:** This option means that you do not consent to sharing any information in the HMIS. Selecting this option means that we cannot refer you to other providers for services, therefore, we must end the call.	
By default, client records will be visible to <u>all</u> other providers. If the caller disclose that they are experiencing specific circumstances, their record should be locked. If you disclose that you are a victim of domestic violence and/or human trafficking or that you are HIV/AIDS positive, I will automatically set your choice to "Limited Sharing" and lock your record. • Are you a victim of domestic violence or human trafficking? • Are you HIV/AIDS positive?	
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**." 	Ensures link to Client records and provides enhanced Search screen. Calls must be linked to a new or existing Client record

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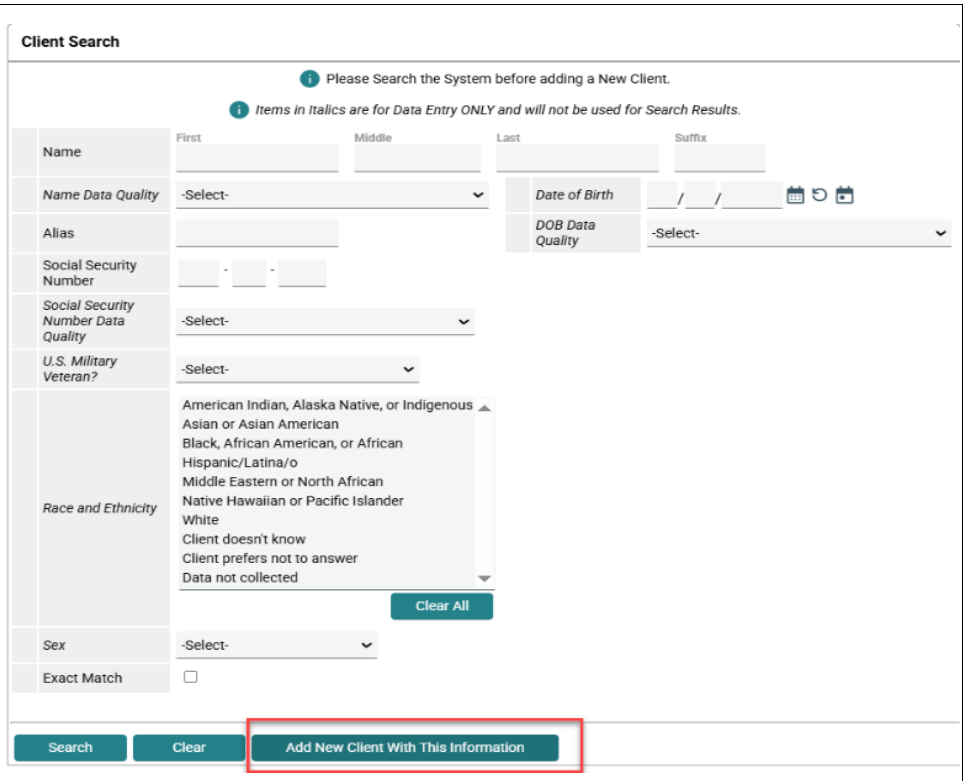
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Data Elements (Process) | **Definition**

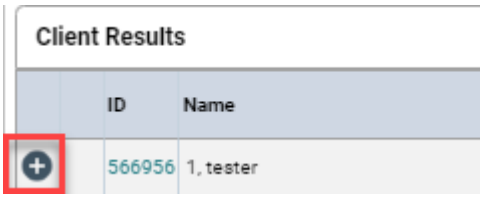
Search for client record

- Name: Since people may spell names differently or clients may provide alternate versions of their name, an important step to take is to try searching possible names. It may also be beneficial to ask if the caller has provided alternate names in the past.
- The best data element that can be used to connect a record to a caller is their Social Security Number, along with their Date of Birth and Sex.

While searching, ask, "Have you called our service in the past"



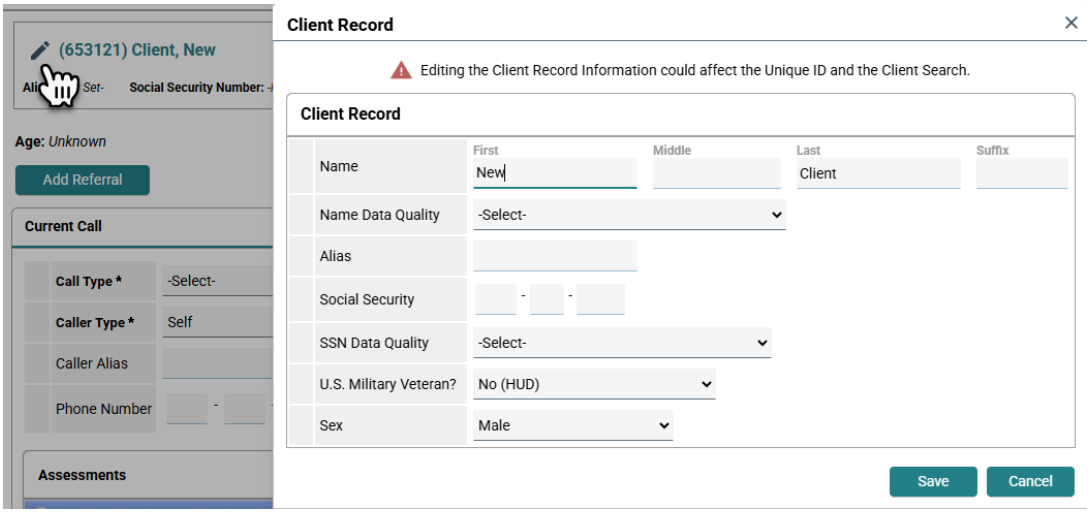
If the **Client Record is found,** Click on the plus next to the Client ID and Name



If the **Client Record is not found**



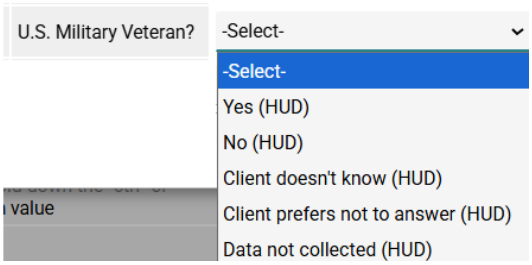
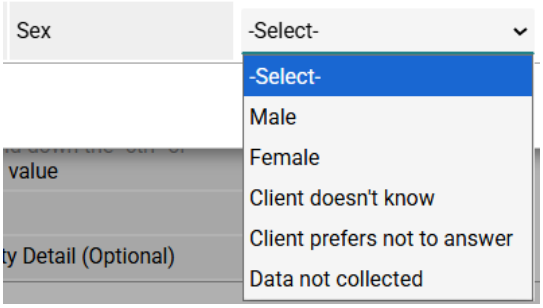
Once the caller's information has been connected to an existing or new record, **complete or review their Client Profile** by clicking the pencil icon next to their name:



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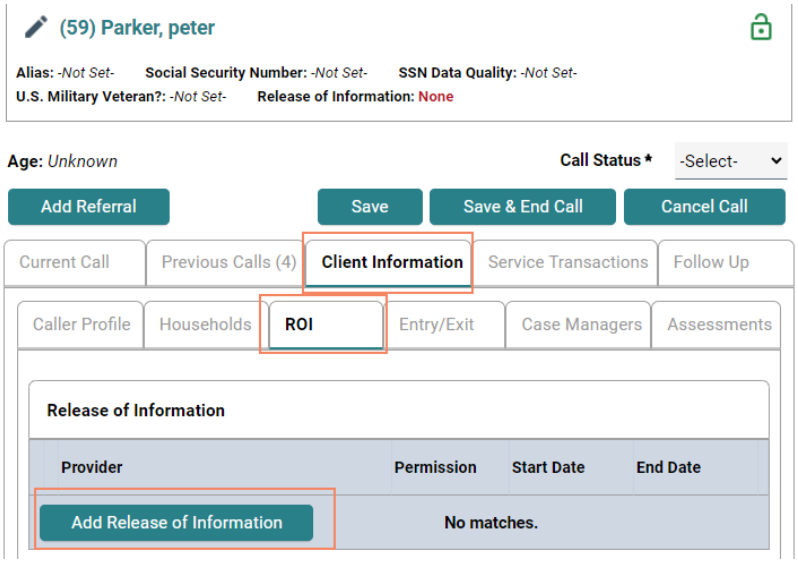
Updated November 2026

Data Elements (Process)	Definition
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.**
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 	Select whether the caller is a U.S. Military Veteran. Have you ever spent any time in the US Armed Forces? **Required**.
Sex 	Sex question must be completed at the time of client creation or by editing the client record for existing clients. **Required.** "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.

Data Elements (Process) | **Definition**

Step 2: Release of Information & Record Locking

All callers must have a Releases of Information entry completed.



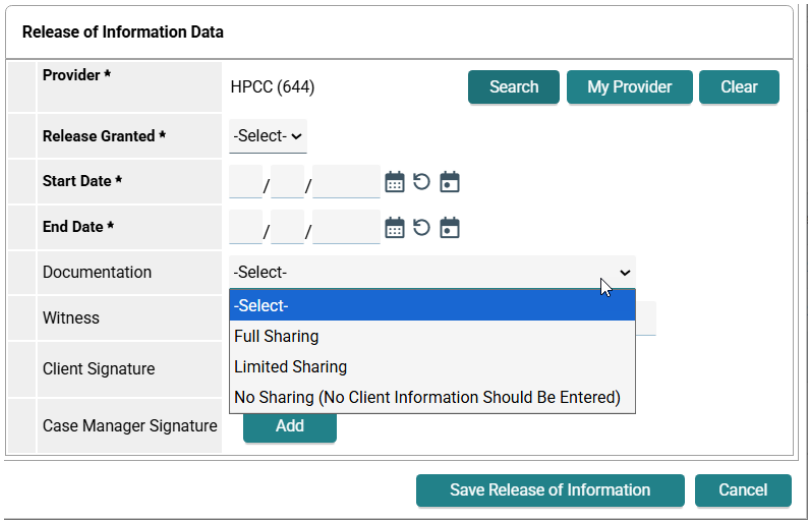
This can be done via the Client Information Tab followed by clicking on the tab ROI. You will need to create one ROI in HMIS to document the client's data-sharing preferences.

Client Consent for Data Sharing

- Full Sharing
- Limited Sharing
- No Sharing

To begin entering the ROI.

Click on Add Release of Information



Provider: HPCC (644)

Release Granted: This is dependent on the Documentation.

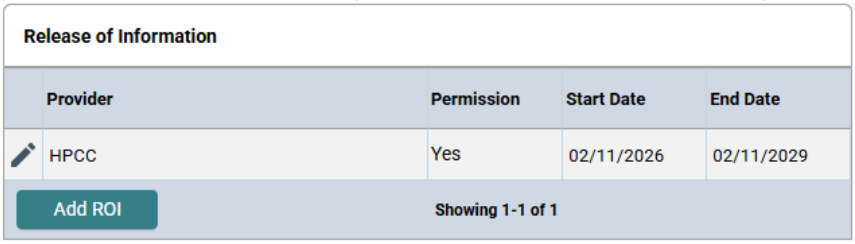
Start Date: The date of the call

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**.

Documentation	Release Granted
Full Sharing	YES
Limited Sharing	
No Sharing	NO



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

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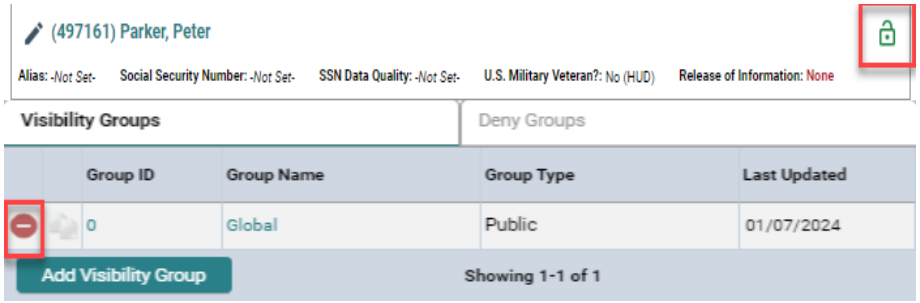
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Data Elements (Process) **Definition**

If the caller falls under any of the following circumstances, their record must be **locked**:

- Selected Limited Sharing on their consent form
- Experiencing or fleeing domestic violence and/or human trafficking
- Self-reports as being HIV/AIDS positive
- An unaccompanied minor



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

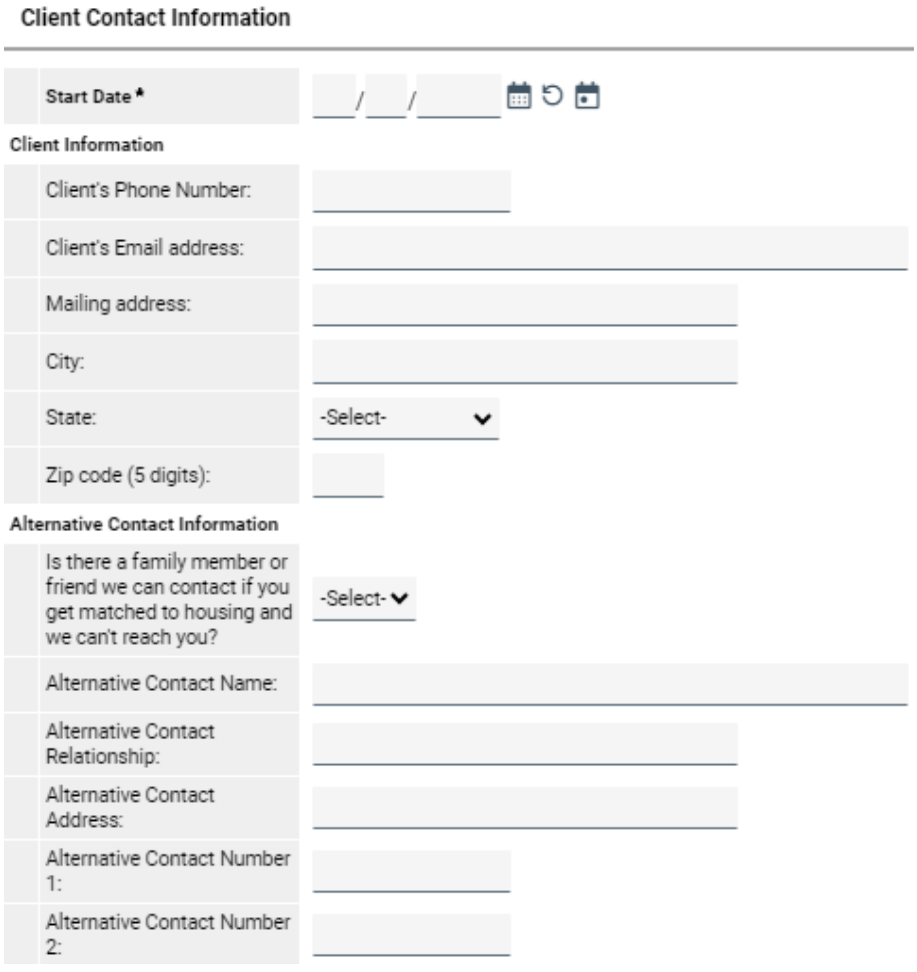
If unable to lock on your own for any reason, a **supervisor** should complete the Profile Lock Request Form

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.



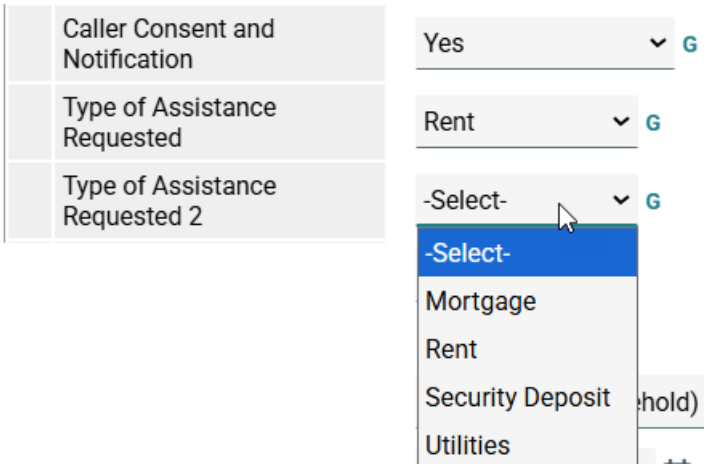
Client Contact Information



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? ".

Data Elements (Process)	Definition
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's current zip code. 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.
Alternate Contact	Ask, "Do you have an alternate number in case they are unable to reach you at the first number? ".

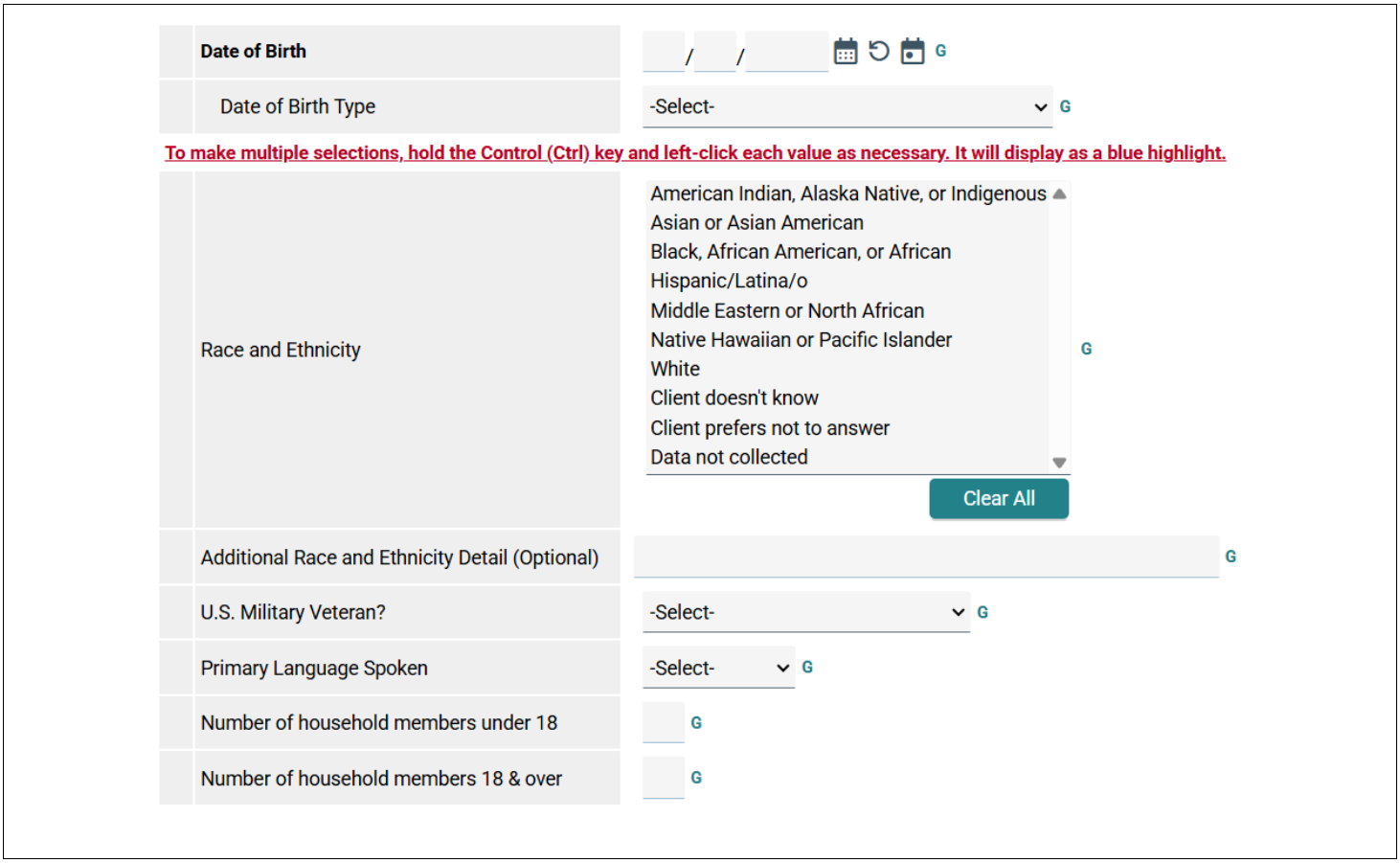
Reason for Call



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

Data Elements (Process)	Definition
Type of Assistance Requested	"Are you calling for rent, security deposit, mortgage, or utilities?" 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
Enrollment CoC **Enrollment CoC *** IL-510	Enrollment CoC should always be IL-510
Relationship to Head of Household **Relationship to Head of Household *** Self (head of household)	Since the assessment will only be completed by the Head of Household, "Self" should be selected.

Client Demographics



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Updated November 2026

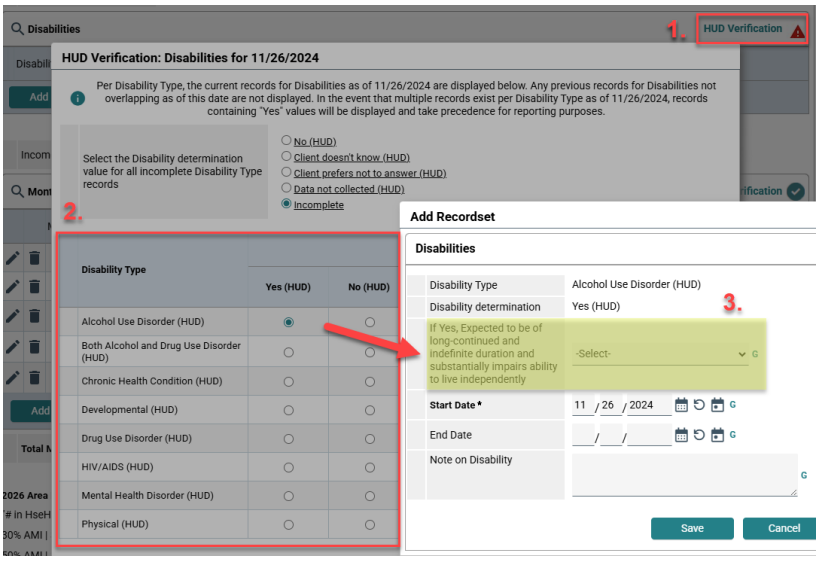
Data Elements (Process)	Definition
Date of Birth **Date of Birth Type** Full DOB Reported (HUD) Approximate or Partial DOB Reported (HUD) Client doesn't know (HUD) Client prefers not to answer (HUD) Data not collected (HUD)	Ask, "What is your date of birth?". If the caller refuses to provide DOB, ask "Are you over 18?". If the answer is "No", do not proceed and contact the Supervisor. **Required** Choose an appropriate answer based on the caller's disclosure. **Required**.
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)

If the profile is **new and no data** pre-fill the table:

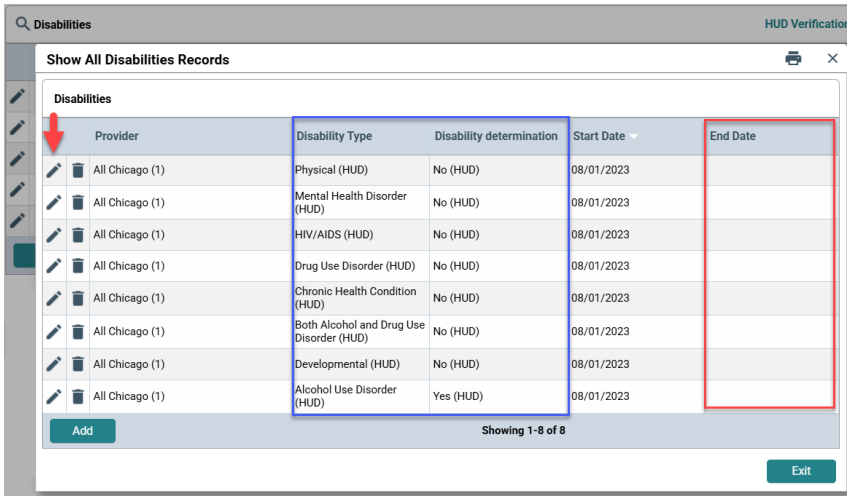
1. Click the **HUD Verification** button on the top-right of the disabilities sub-assessment.
2. Select whether the caller reports having any of the listed disabilities.
3. If yes, fill out the additional disability information and save.



Data Elements (Process)	Definition

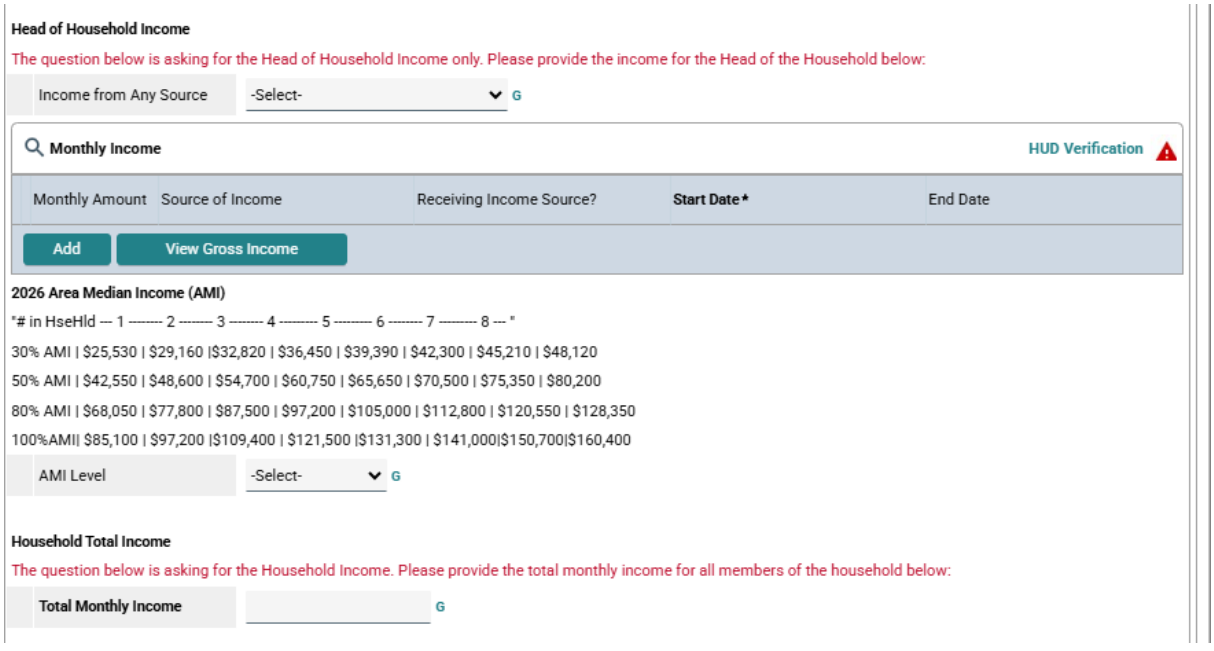
If the profile existed in the system and **data pre-fills** the table,

1. **Confirm** determination of each disability type
2. If any **change** is reported, **add an end date**. The end date should be at least the day before the call.
3. **Add a new entry** with the new determination. **If yes**, fill out the additional disability information. Save



Medical Insurance	Ask, "Do you have medical insurance?". **Required**.

Income and Expenses



Income from Any Source	Ask, "Do you receive income from any source?". **Required**.

Data Elements (Process)	Definition

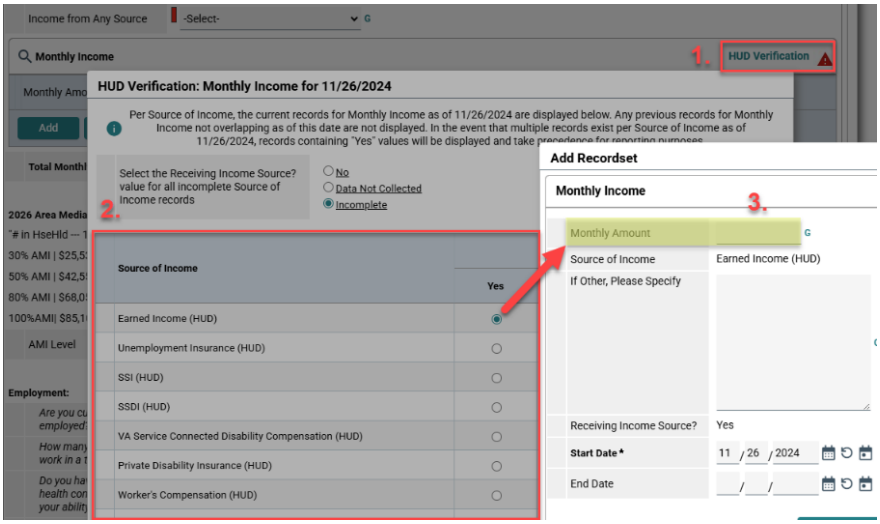
Monthly Income (Sub-assessment)

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?"

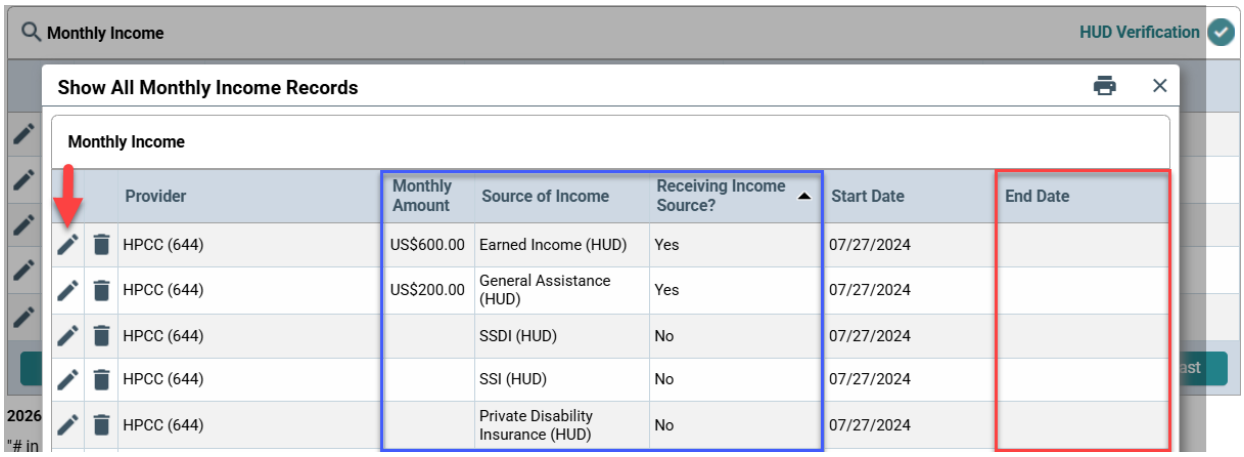
If the profile is **new and no data** pre-fill the table:

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.



If the profile existed in the system and **data pre-fills** the table,

1. **Confirm** whether they receive and the amount of each income source
2. If any **change** is reported, **add an end date**. The end date should be at least the day before the call.
3. Add a **new entry** with the income information. **If yes**, make sure to add the amount. Save

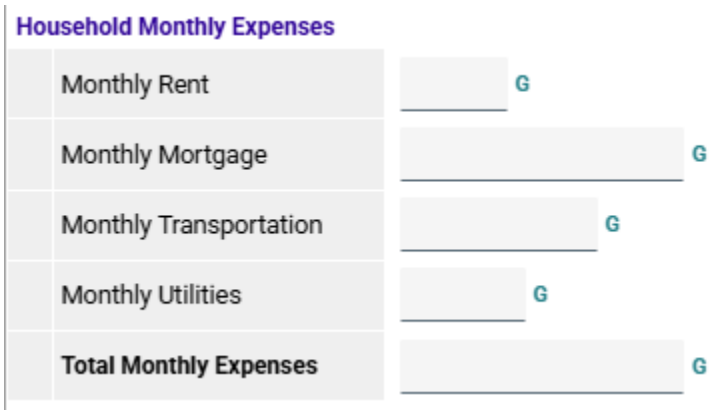


AMI Level	Using the AMI chart based on household size and income (adjust for gross), select the appropriate AMI. **Required**.
Total Monthly Income This question is asking for the total income of the Household. This would be the total income of all Household members	Add the income amount available to the caller to pay their monthly bills. If they do not receive any income enter "0". **Required.**

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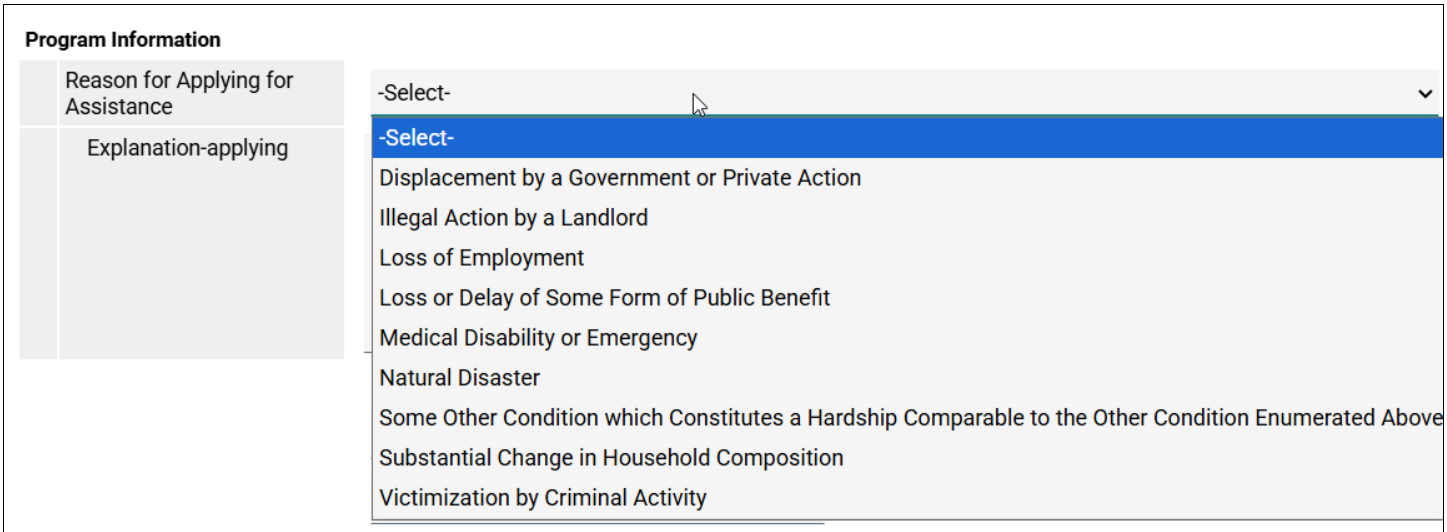
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Updated November 2026

Data Elements (Process)	Definition
Household monthly expenses  	
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**.

Data Elements (Process)	Definition

Program Information



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

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?" If the caller stays in a rental, Ask, "Do you have a subsidy to help you pay your monthly rent?" Record the caller's answer. **Required**.

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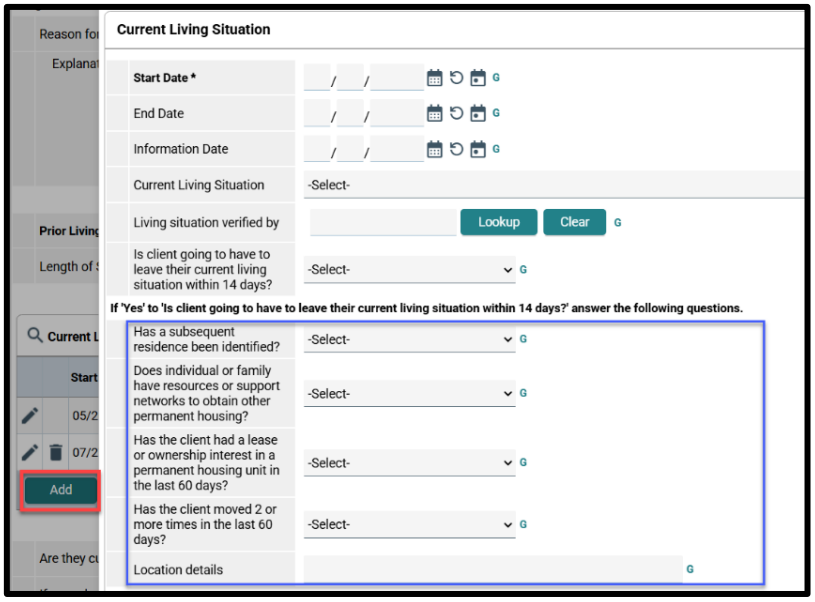
Data Elements (Process)	Definition
Length of Stay -Select- One night or less Two to six nights One week or more, but less than one month One month or more, but less than 90 days 90 days or more, but less than one year One year or longer Client doesn't know Client prefers not to answer Data not collected	Ask, "How long have you lived in your current placement" or "How long did you live in the previous place?".

Current Living Situation

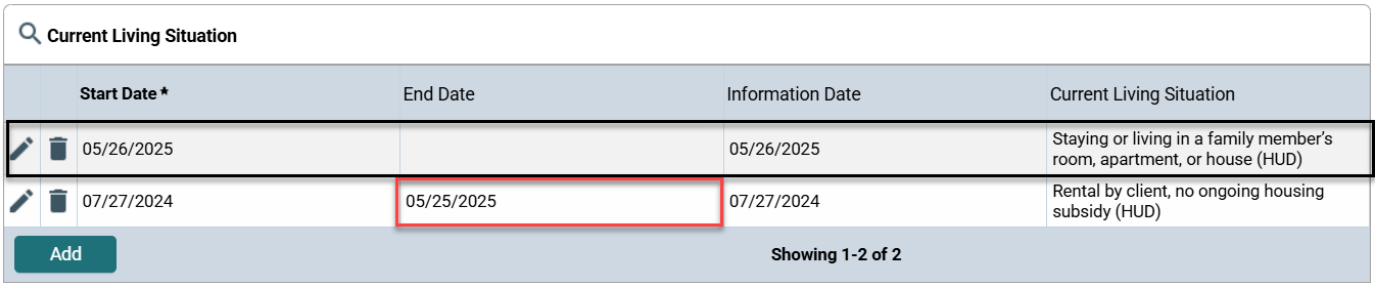
This sub-assessment collects where the caller will be sleeping the night of the assessment.

Ask, "Where are you staying tonight?"

1. Confirm with the caller where they are staying tonight.
2. If the profile is new and no data pre-fill the table, then **add a new entry**, and use the table below to answer the questions.



3. If the table pre-fills data:
   a. If what the caller states is different than the most recent entry, **add an end date**. The end date should be at least the day before the call.
   b. **Add a new entry** with their new living situation. Save and Exit.



Start Date	Leave as the date of the call
End Date	Leave blank to indicate ongoing situation

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Scripts highlighted in GREEN

Updated November 2026

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Information Date	Enter the date of the call
Current Living Situation	Select where the caller is sleeping tonight. If they are staying in a rental, ask, "Do you have a subsidy to help you pay your monthly rent?" Record the caller's answer.
Is client going to have to leave their current living situation within 14 days?	Ask, "Do you have to leave your current situation within the next 14 days?" If the client responds with YES to this question, the following section (highlighted in blue above) should also be answered.

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, 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.**

Data Elements (Process)	Definition
	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.

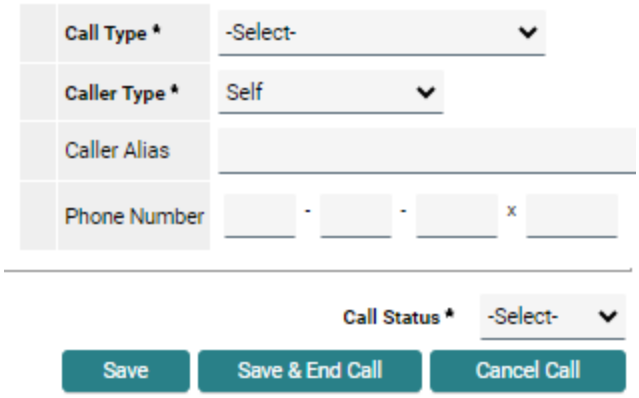
Data Elements (Process) **Definition**

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.

<u>Located under Current Call Tab</u>
Call Type
Caller Type

<u>Located top right corner of the call screen.</u>
Call Status



If the assessment was <u>COMPLETED</u>	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 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.

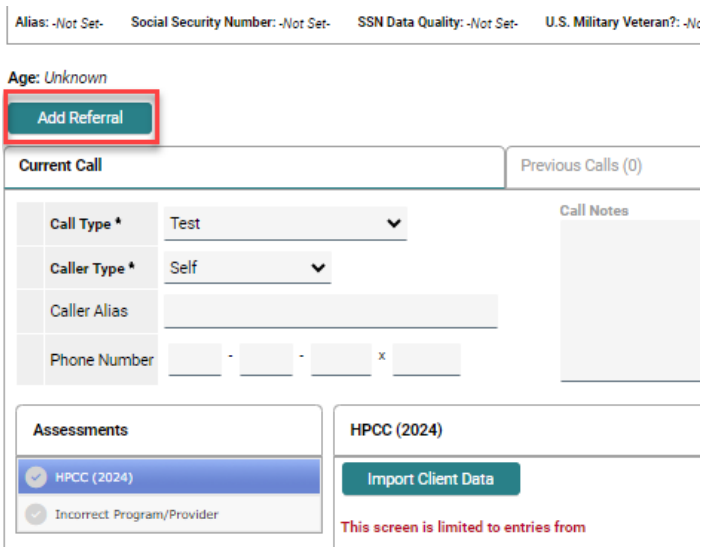
Data Elements (Process)	Definition
	Call Type = Ineligible Caller Type = Self Call Status = Incomplete
If client is outside of Chicago	If the caller is outside of Chicago or the designated community areas within the city, please let them know they are not eligible for Homeless Prevention. If the caller 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: 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

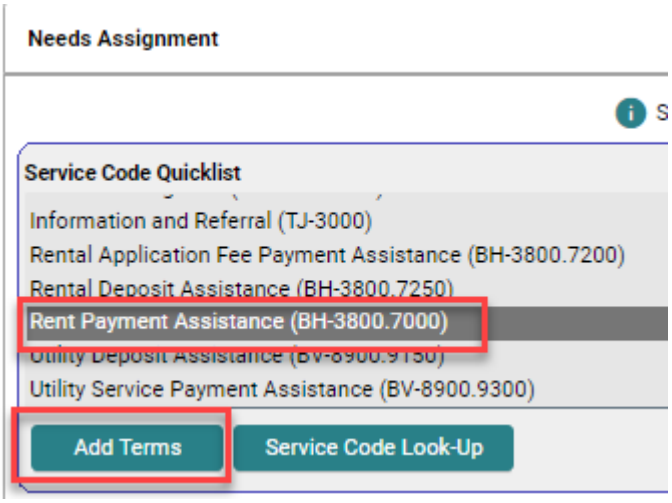
Add Homeless Prevention referral by clicking **Add Referral** at the top of the Call page



Add a need that reflects the caller's request (i.e., Rental Payment Assistance).

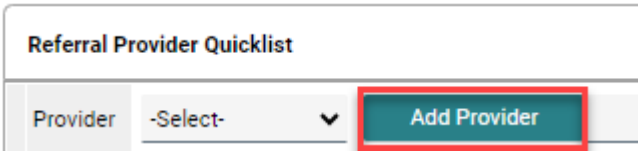
Only one needs to be selected per client record.

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**



Homelessness Prevention Call Center Call Point Script/Workflow

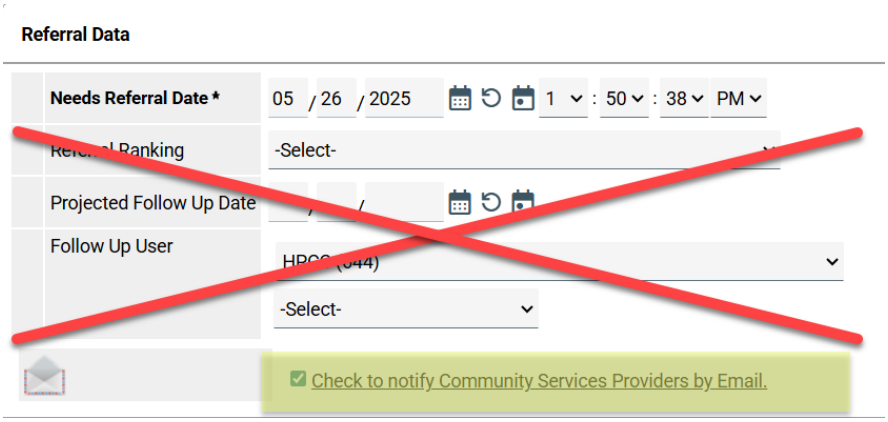
Scripts highlighted in GREEN

Updated November 2026

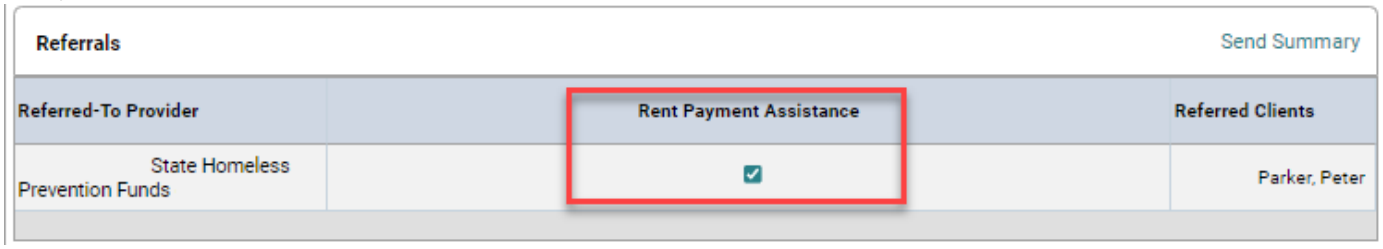
Data Elements (Process) | **Definition**

Check the box at the bottom of the Referral Data to send an automated email notification to the Referred-to Provider.

You do not need to fill out the other questions in this section.



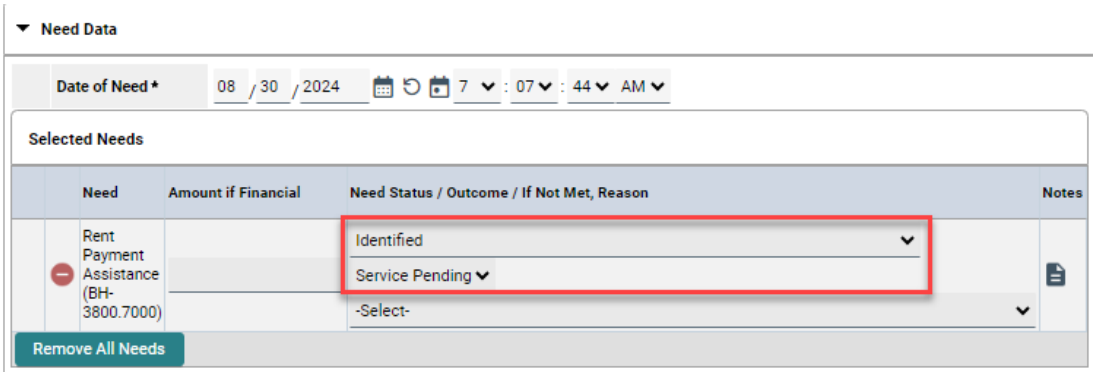
Next, ensure that the Service selected from the Service Code Quicklist has a check in the box under Referrals.



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

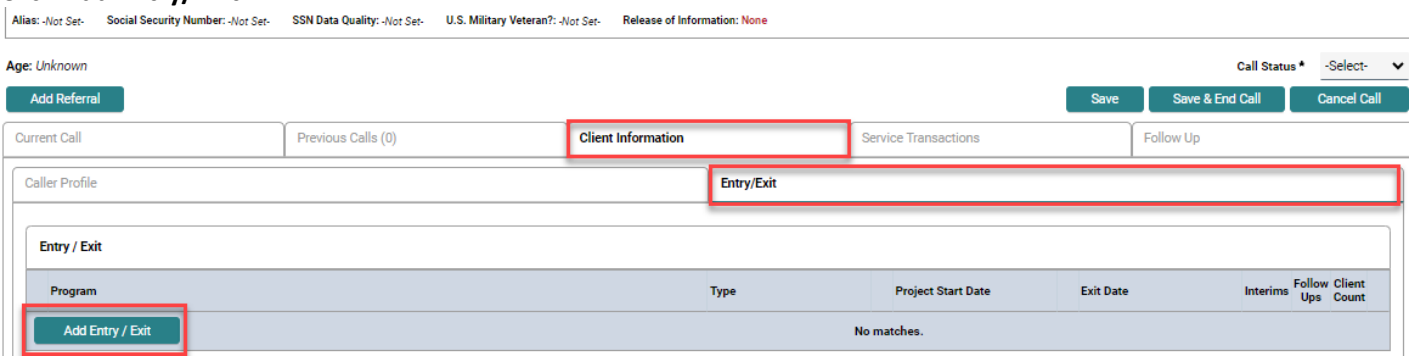
Notes: Let the client know that a referral has been provided and to expect a call from the agency within 10 business days. Reiterate that a referral does not mean they have already submitted a referral or been approved for funding. If they have not heard back from an agency after 10 full business days, 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.

Step 6: Entry/Exit Enrollment

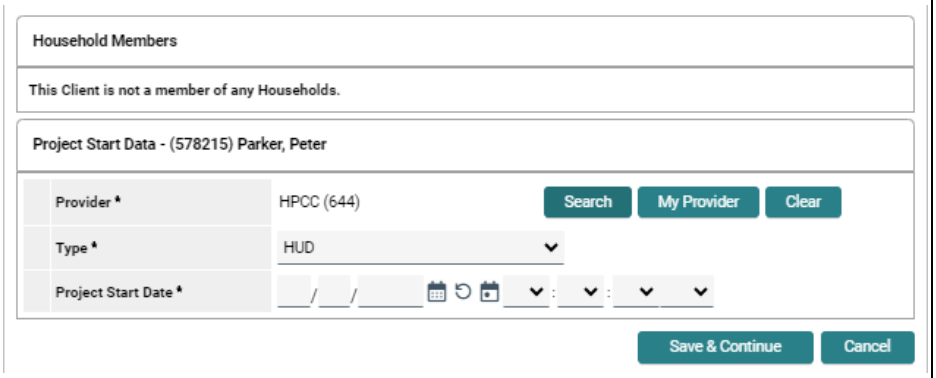
This step is only required for all HPCC assessments that were completed. If the caller did not consent, was deemed ineligible or was outside of Chicago, steps 5 and 6 are not required.

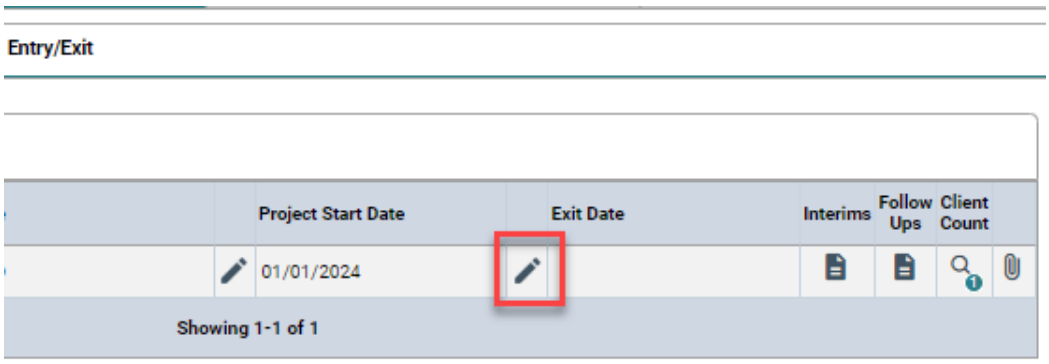
Enrollment can be completed by navigating to the **Client Information Tab** followed by the **Entry/Exit tab**.

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.

The caller's destination should be where the caller will stay tonight.