Client Connect: Agency Basics - Quick Start Guide

A Reference Guide for Caseworkers, Supervisors, and Call Center Agents

PURPOSE

Client Connect is part of the disaster suite of tools recording initial client information to help individuals and households impacted by disaster access additional assistance. It is intended to be used in the initial phases of a disaster by caseworkers performing outreach in shelters, impacted communities, and multi-agency resource centers. Access is limited to voluntary and non-profit agencies. Cases entered in this module may be transferred to the Disaster Case Management module for longer-term recovery (if that module is activated).

ABOUT the QUICK START GUIDE

This guide will help users apply the fundamentals of the client interview tool, “Client Connect.” This guide is designed to support Caseworkers and Supervisors after they have completed the technical training webinar.

NOTE: This guide is designed to support users in the “Outreach” mode; however, the core concepts in this guide are also relevant for other Client Connect modes such as “Call Center.”

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1 - Overview of Client Connect

Accessing Client Connect

This module is only activated for specific disasters authorized by National VOAD. It is intended for use by non-profit and voluntary agencies and approval is required for access. Each Agency Lead has the ability to authorize additional individual user accounts for that agency.

This module may be deployed in one of two ways (called modes):

1. Outreach Mode: for use by caseworkers working directly with clients.
2. Call Center Mode: for use by call center staff working with clients on a phone; may not be trained caseworkers.

Either mode may be activated by the impacted state and may work simultaneously.

About the Outreach Mode

Client Connect is a tool to help caseworkers establish an initial case in the response phase of a disaster in advance of Case Management.

There are four components to the Outreach mode:

1. Basic client form includes contact information, housing details and other information related to the administration of a case.
2. Referrals to other agencies offering assistance may be searched and recorded directly from the case record.
3. Household Tool captures key information about individuals associated with that case.
4. Follow-Up Manager allows for additional information to be captured to support a client's transition to the recovery phase.

The Outreach mode is optimized for mobile devices to let users help clients with a bring your own device (BYOD) phone, tablet, laptop, or desktop. While most browsers and devices are supported, Chrome and FireFox are the browsers that seem to get the best results.

About the Call Center Mode

Call Center mode is intended for larger-scale disasters where casework during outreach is not practical and phones are the primary means to capture client information. There are several features to the Call Center mode to consider:

1. The question-driven form reduces training needs and makes the interview more intuitive.
2. The Call Center form collects the identical case data as "Outreach Mode" but has a slightly different look.
3. Cases are typically affiliated with the call center as the Caseworker Agency (e.g. Hurricane Jerry - Call Center)
4. Call Center Agents may only access cases associated with the call center event and may only search existing cases to check for duplicates.

About User Roles and Permissions

Client Connect has five user roles depending on which mode is active:

1. Caseworkers may create, edit, and search for cases.
2. Supervisors may do everything as Caseworkers PLUS export their agency data.
3. Resource Managers may access data in the Resource database, but cannot access any recorded client case data related to those referrals.
    a. RMs have access to the import/export tool to streamline data entry.
    b. RMs cannot access client data.
4. Call Center Agents may create new cases, but are unable to edit existing cases.
5. Agency Lead will authorize agency users. This user role is combined with any of the above user roles.

NOTE: Cases assigned to an agency may only visible to those agency users.

NOTE: Cases with a Case Status of "Duplicate" are only visible to Supervisors.

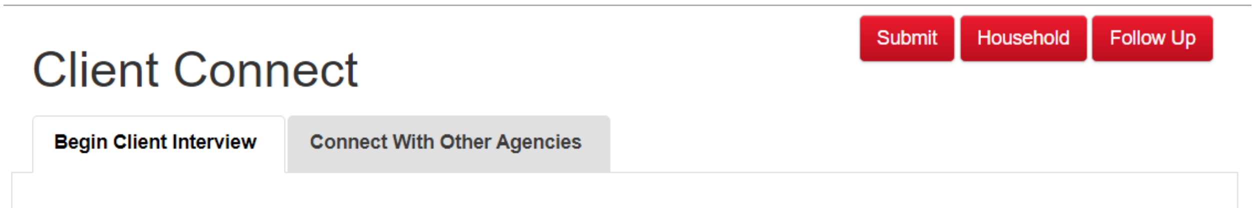
Transitioning to Recovery

When the Case Status is changed to "Ready for Recovery" it is flagged for recovery. Cases may be reassigned to other agencies as casework begins. Cases may be transferred to the DCM module (if activated) when CM begins under a federally-funded grant program.

2 - Creating New Client Cases

Organization of Client Connect

1. Subsections of Client Connect are organized into 5 steps to simplify case entry for new users.
2. Required Fields appear with an asterisk (*); the message prompt notifies users to complete the field if it has been left blank before the case may be saved.
3. Some fields need specific input--such as an email address, which must contain valid data. Users are prompted with a short message in red directly under the field which needs attention.
4. SmartFields appear with a cog icon ( ) and may interact with other fields or sub-sections to change the visibility of hidden fields or require input.
5. Additional forms (Household, Follow-Up) are accessed by selecting either button in the top right corner.



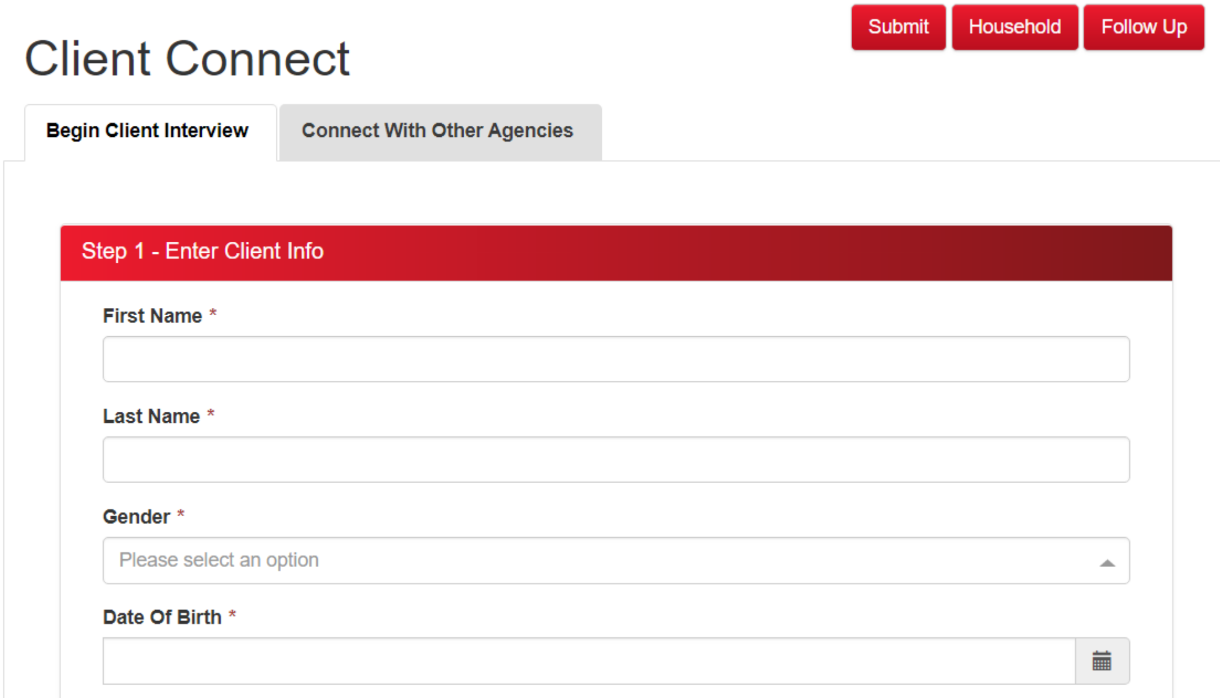
Step 1: Entering Client Data

Client information should be entered as reported by the client from the top of the form to the bottom. Prompt your client to spell out words if needed.

All fields identified with an asterisk (*) are required to be completed.

Use the date picker to select the primary client's date of birth. Dates may not occur in the future.

Always include the area code with a client's phone number.



TIP: Some fields require certain format to be valid (i.e. email address must include an @ sign and a valid top level domain (i.e. name@domain.com)

Step 2: Entering Housing Information

Accurate housing information is critical for contacting the client in the future as well as understanding the impacts to their housing.

Select from the drop-down list the best description of the client's pre-disaster living situation.

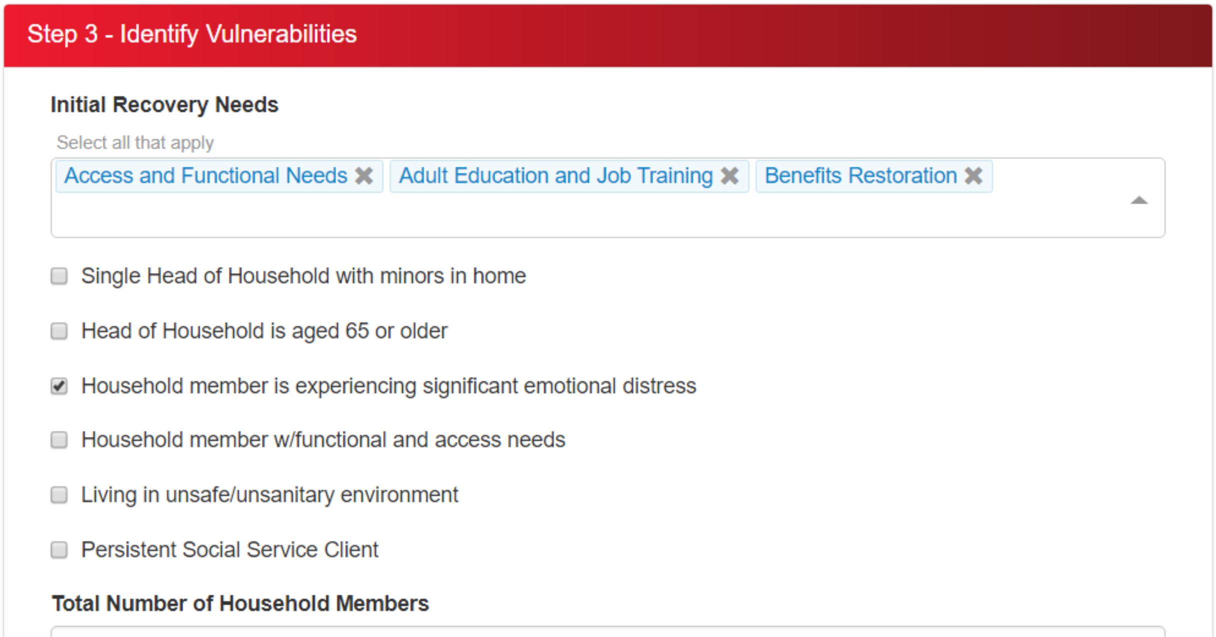
Begin typing the client's address in the "Address 1" field and carefully select the correct address from the suggested list.

TIP: Once you have selected the address, read the contents of Address 1, Address 2, City and State fields back to the client to confirm accuracy.

Step 3: Identify Vulnerabilities

This section will identify if a household has special needs or if the client or member of their family may be eligible for specific programs.

Select Initial Recovery Needs from the dropdown, which the client has no means to meet in the immediate future (and select all that apply).



TIP: If a client lacks clothing today, but is returning to the impacted home to retrieve clothes, *do not* select Clothing as an initial recovery need.

Step 4: Record Case Notes

Case Notes should be concise and include basic information exactly as relayed by the client. Individual agencies may have additional practices for documenting routine case actions. Check with your supervisor if you have any questions.

- Do not record any medical or legal information.
- Be respectful. Clients may read your notes at some point.
- Leave the Case Notes field blank if there is nothing to add for the next person helping this client.

Referrals

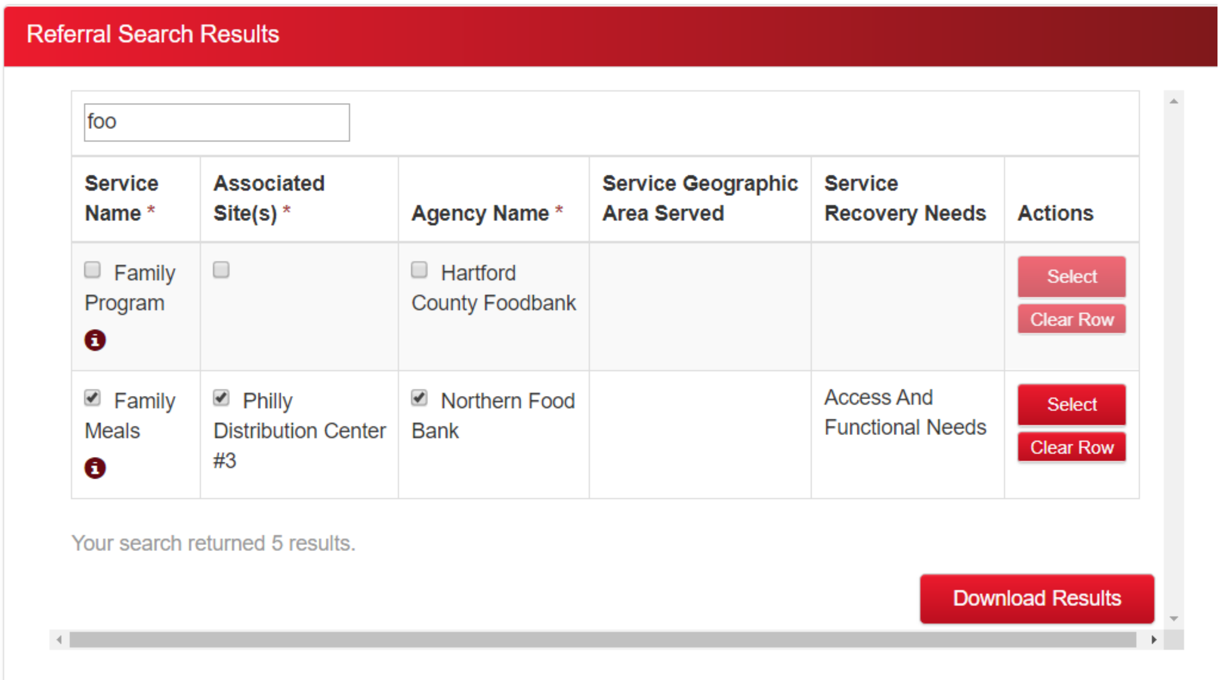
Referrals help clients access additional services from other agencies. After identifying Vulnerabilities and Initial Recovery Needs, you may uncover the need for services provided by other agencies that would be appropriate for the client.

Before Finalizing Case Administration, select “Connect With Other Agencies” at the top tab of Client Connect. This will take you to Referrals and Presenting Needs Search.

- Use the client’s Initial Recovery Needs to begin the search if no specific services were requested.

- Refine the search using the Geographic Area Served to target specific areas near the client.
- Review the search results for services which meet client needs.

TIP: The filter box at the top may be used to refine searches.



To begin a referral, select all three checkboxes associated with the Service, Site and Agency related to that service and “Select” that referral. Then, enter the Units and Amount if known. *Save the Case.*

TIP: The red “x” button may be selected to delete a referral before it is saved.

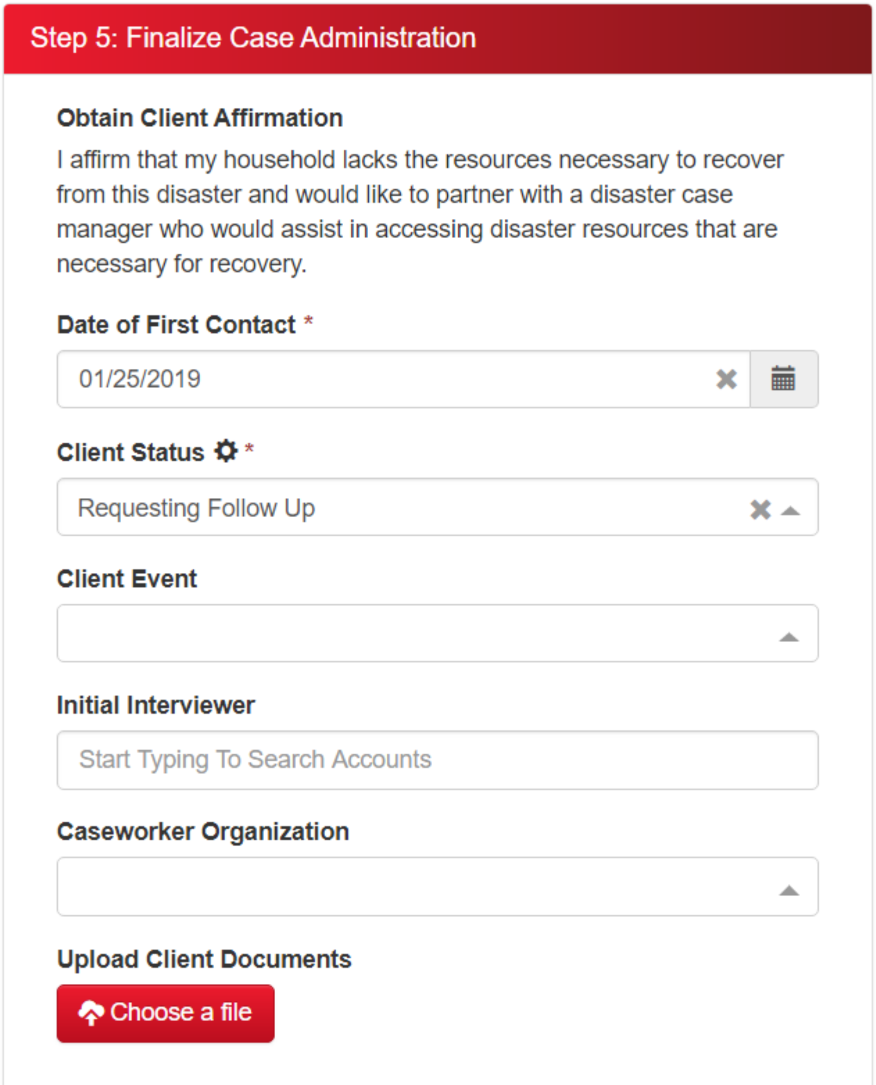
Step 5: Finalize Case Administration

The Case Administration sub-section captures information about the caseworker, agency, and dates related to initial interview.

Obtaining consent to share client information is vital to ensure the client understands what happens to their information.

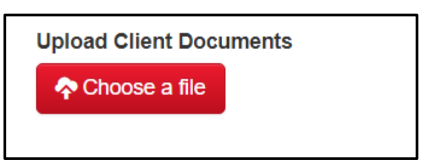
Please read the statement to the client before saving the case. *If a client declines, end the interview and do not save the case.*

Continue to offer services as needed.



Client Status: select from dropdown; most cases will be set to “Requesting Follow Up” in the early phase of a disaster.

Upload and attach any relevant documents the client provides with the Upload Client Documents.



TIP: File Uploader supports common document and image formats (Word, text, JPG, PNG, and .ZIP) and up to 10 files (max file size is 10MB). Use a .ZIP file to upload more than 10 files.

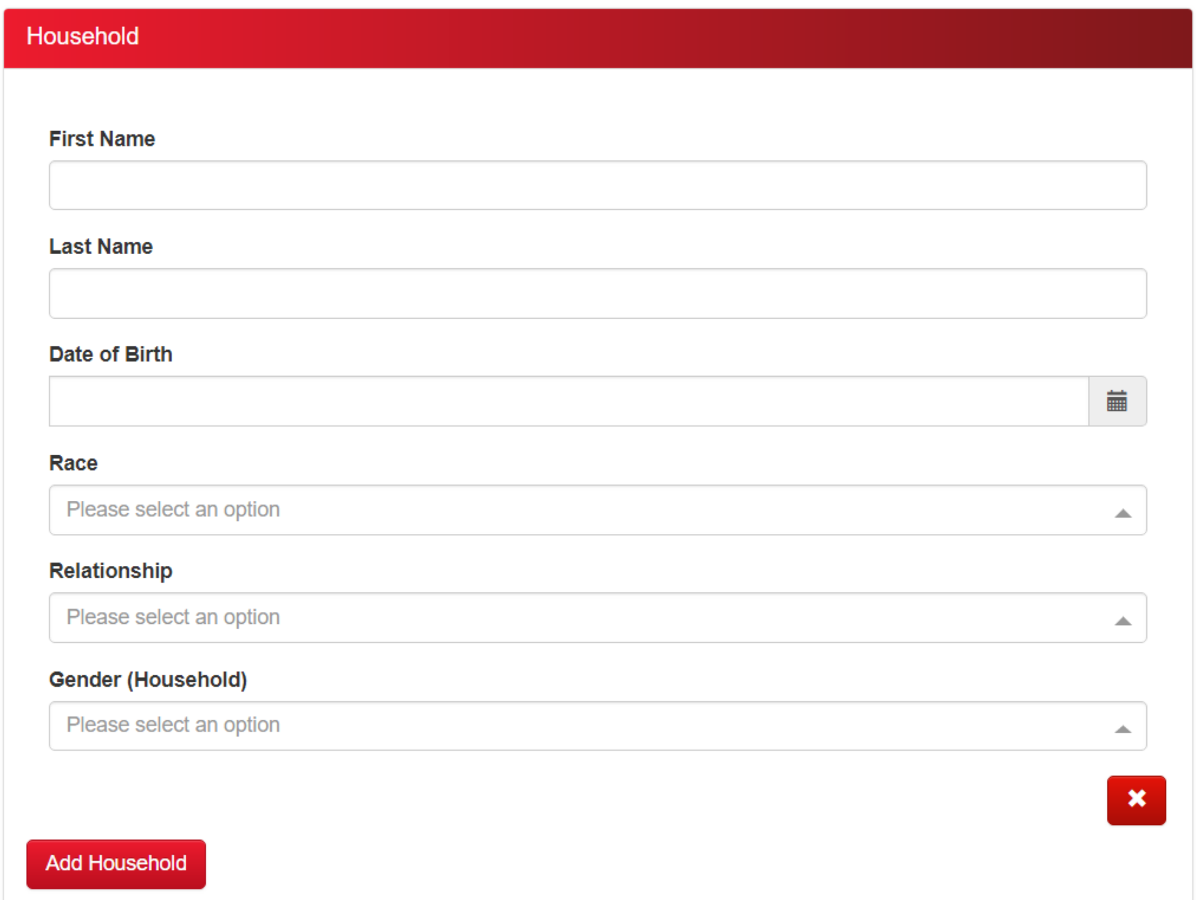
TIP:Do not upload the client's driver's license or other sensitive client documents.

Length of Interview tracks and records the amount of time working on the case record.

TIP: Case records should be saved every 30 minutes to avoid losing data as users may be logged out after 30 mins of inactivity.

Using the Household Tool

Navigate to the Household Tool by selecting the button in the top right-hand side of page or along the bottom next to the "Submit" and "Follow-Up" buttons AFTER you have "Submitted" the case to be saved.



- The Primary Client's information should be entered (as it was on the previous form) as well as each household member. To add other members of the household, selecting "Add Household" for each household member.
- There is no legal relationship required for household members (i.e. partners, roommates, friends, etc.).

- Save the record by selecting "Submit"

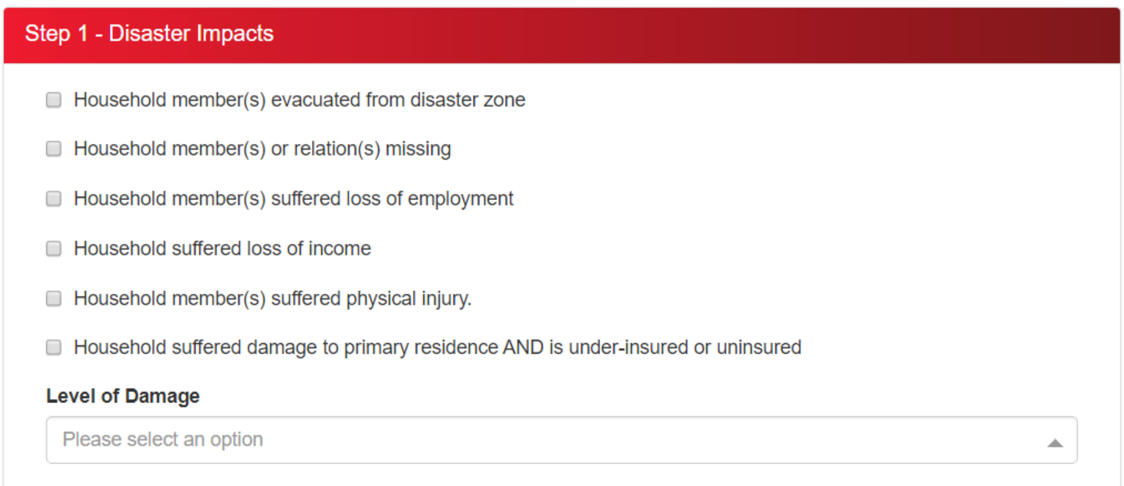
TIP: The Primary Client may add any individual to their household who is *not* a Primary Client in another case (spouses who are separated may include their children in both households).

About the Follow-Up Manager

Follow-Up Manager is intended for longer-term recovery cases a week or two following the initial client interview.

Using the Follow-Up Manager gives a caseworker the ability to confirm key information collected in the initial interview (e.g. "Current Housing" and "Current Address").

1. Supports disasters with federal declaration including Individual Assistance.
2. Ask the client about the status of the fields in the Recovery Resources sub-section.

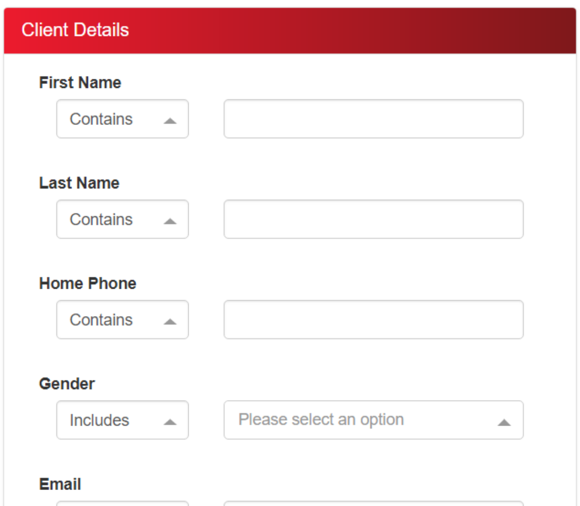


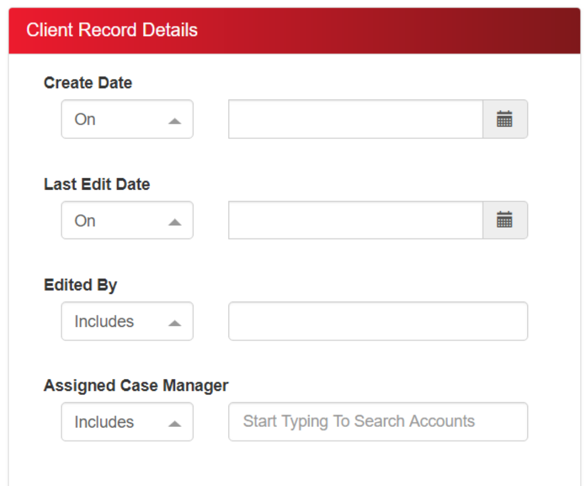
3 - Managing Client Cases

Searching for Existing Clients

When a client has completed an initial interview, you can search for that case in a number of ways. First, begin at the landing page, select the "Client Connect/Client Interview" button, and you'll be directed to the "Initial Client Interview" form. There you will see several choices for the search you would like to perform.

Selecting "Client Search". This will take you to the Search Form into which you can enter multiple pieces of information to perform a search.





Each Search field has a distinct purpose for refining the search results

- Text-based searches may be exact match or partial match. The "Contains" criteria is the most flexible.
- Date-based searches have several options, the most common include:
    a. Created On
    b. Created Before/After
    c. Created Between
    d. Within the Past Number of Days (or Months)
- Option list-based searches
    a. Some fields support multiple values (select "Includes Any")
    b. "Includes Any" or "Blank"may return more results than expected; use with caution
- Checkbox (Boolean) criteria will return cases where that value is TRUE

TIP: Cases must match ALL search criteria to be included in Search Results. Using too many search criteria may exclude cases missing one of the search criteria.

Follow these best practices for identifying potential duplicate cases before creating a new case:

- First, search pre-disaster address to see if other household members have registered.
- Second, search on Last Name AND Date of Birth.

Working with Duplicate Cases

- Before creating a case, determine if there is an existing case first; work with the Assigned Caseworker (if applicable) to determine how best to support this case.
- When potentially duplicate cases are discovered, change the Case Status to "Duplicate" only after discussion with any Assigned Caseworkers.
- Remember the possibility of multi-generational households (grandparents, parents, siblings and other relations). Be sure to check "Date of Birth" as there may be more than one resident at the same address with the same exact name.

Working with Search Results

- Refining the search results with the "Filter" box will remove any results which do not match that key phrase.
- Sort columns to organize your results by selecting the column header.

TIP: Caseworkers may use the "Download Search Results" button for a quick export of values which appear in results; case data that is not visible on the screen will not be included in the export file.

Editing Cases in Search Results

- Use "right-click" to "open in a new tab" to preserve search results on previous tab.
- Always save the case if edits are made; navigating to the Household Tool or Household Manager will automatically save the record.

4 - Exporting Cases (Supervisors Only)

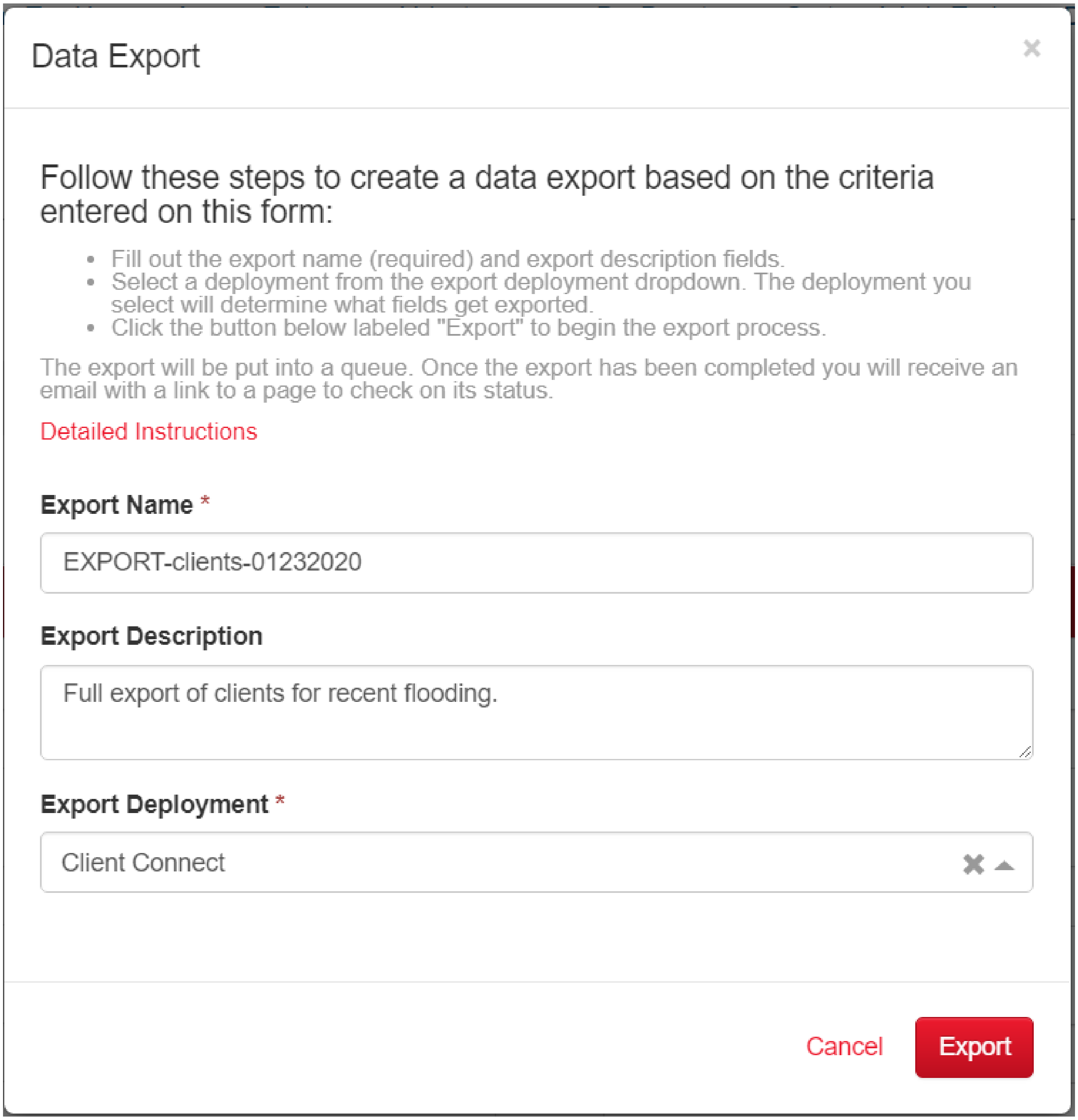
Building Exports

1. Export criteria are created similar to Case Searches
2. Use the "Preview" button before running export; only 200 cases will be displayed
   a. Quick confirmation that export criteria returned desired cases

b. Increases accuracy of exports, reduces restrictive exports which do not produce any cases

Starting the Export

1. The button in the top right-hand side begins the Export process based on entered criteria
2. Enter an Export name
    a. This becomes the name of the file you download
    b. Include the date for tracking over time and version control
3. Selecting an Export deployment
    a. Select any available option with [RESULTS] in name
    b. Each “deployment” determines which fields appear in your export; some are small some can include every field
    c. Some users may see more than one Export Deployment



Data Export

Follow these steps to create a data export based on the criteria entered on this form:

- Fill out the export name (required) and export description fields.
- Select a deployment from the export deployment dropdown. The deployment you select will determine what fields get exported.
- Click the button below labeled "Export" to begin the export process.

The export will be put into a queue. Once the export has been completed you will receive an email with a link to a page to check on its status.

Detailed Instructions

Export Name *

EXPORT-clients-01232020

Export Description

Full export of clients for recent flooding.

Export Deployment *

Client Connect

Cancel Export

Working With Export Files

1. Each export file is delivered via an email associated with the user's account
2. Users must login to download the file
3. The link in the email is available for 30 days
4. Other users with Export permissions may download the export file if the link is shared
5. Best practices for handling client data:
    a. Delete downloaded files when no longer of use

b. Password protect the export file when sending to users at your agency
c. Do not share confidential client data on private emails (such as Gmail or Yahoo.)

"EXPORT-clients-01232020" Export Completed Inbox x

exports@eos.communityos.org
to me

The data was exported using the following deployment:
https://eos.communityos.org/client-export

Then formatted using the following deployment:
https://eos.communityos.org/client-connect

Completed at:
2020-01-23 07:45:15.247556-07

Description:
Full export of clients for recent flooding.

The export excel book is stored here:
https://eos.communityos.org/export-view/render/id/10/form/run/record_id/37