

211 Calls Workflow CS 5.15

Pre-Requisites

Users will need working knowledge of the [Standard Operating Procedures](#), how to navigate the Homeless Management Information System (HMIS), and minimum data collection requirements for 211. Real time data entry is necessary to ensure accurate data collection and reporting.

Calls

1. Access the Calls Module from the left-hand menu.
2. When a 211 call comes in, Start New Call.

The screenshot shows the 'Call Record Search' interface. On the left, a dark blue sidebar contains navigation options: Last Viewed, Favorites, Home, Calls (with a red circle '1'), Resources, Reports, Admin, and Logout. The main content area has a breadcrumb 'Calls > Call Record Search' and a search bar. Below the search bar, there is a 'Show Advanced Search' button and a 'Start New Call' button highlighted with a red circle '2'. A red circle '3' is also present near the top left of the search area.

Current Call

The screenshot shows the 'Add/Edit Call Record' interface. The breadcrumb is 'Calls > Add/Edit Call Record'. The form title is 'Call Record (2904) - 10/03/2023 09:31 AM'. The form includes fields for Caller Name (First, Middle, Last, Suffix), U.S. Military Veteran status, Age, Call Type, and Caller Type. A red circle '3' is next to the title, and red circles 'a', 'b', 'c', and 'd' are next to the respective fields.

3. Complete as much call data as able.
 - a. **Caller Name** Fields should be left blank.
 - b. Choose the Caller's **US Military Veteran** Status from the list.
 - c. Select **Call Type** and **Caller Type** from the list if not already selected.
 - d. Enter the incoming **Phone Number**, if not autocompleted.
 - e. Complete additional assessment questions as they appear under Assessments.
 - i. Select if **Translation Assistance** is needed.
 1. If yes, choose the language from the provided list.
 2. If the language needed is not in the list select, "Different language preferred", and enter the language into the following text box.
 - ii. Enter a numerical value for the Caller's **Age**.

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- iii. Select the **Gender** that the caller associates with. If the caller associates with more than one gender, hold down the Control key on your keyboard and select each option that applies.
- iv. Enter the **Client Zip** and select "Apply Zip Code Information". This will populate the **Client City**, **Caller/Client County**, and **Caller/Client State** fields using the USPS database. If the zip is not known, enter any known data in the available fields.
- v. Choose how the caller learned about 211 in the **Referred to 211 by** field. If other, type in the response in the available text box.
- vi. Select if the caller provided consent for a follow-up call using the **211 Follow-up Consent** field.

Assessments e

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Mode of Contact with Client	-Select-
Translation Assistance Needed	-Select-
Client ZIP	<input type="text"/> Apply ZIP Code Information
Client City	<input type="text"/>
Caller/Client County	<input type="text"/>
Caller/Client State	-Select-

The following questions are for referral and reporting purposes

Age	<input type="text"/>
<i>To select multiple values hold down the "ctrl" or "cmd" key and click on each value</i>	
Gender	<div style="border: 1px solid #ccc; padding: 5px;"><ul style="list-style-type: none">Woman (Girl, if child)Man (Boy, if child)Culturally Specific Identity (e.g., Two-Spirit)TransgenderNon-BinaryQuestioningDifferent IdentityClient doesn't knowClient prefers not to answerData not collectedClear All</div>
If Other Gender, specify	<input type="text"/>
<i>To select multiple values hold down the "ctrl" or "cmd" key and click on each value</i>	
Race and Ethnicity	<div style="border: 1px solid #ccc; padding: 5px;"><ul style="list-style-type: none">American Indian, Alaska Native, or IndigenousAsian or Asian AmericanBlack, African American, or AfricanHispanic/Latina/e/oMiddle Eastern or North AfricanNative Hawaiian or Pacific IslanderWhiteClient doesn't knowClient prefers not to answerData not collectedClear All</div>
Referred to 211 by	-Select-
If other, referred to 211, please explain	<input type="text"/>
211 Follow-up Consent	-Select-

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f. Select Save before moving to the next step.

The screenshot shows an 'Attachments' table with columns: Date Added, Name, Description, Type, Provider, and Added From. Below the table is a button 'Add New File Attachment' and the text 'No matches.' To the right, there is a 'Call Status' dropdown menu set to '-Select-'. Below the table, there are four buttons: 'Add Referral' (with a red '4' callout), 'Save', 'Save & End Call', and 'Cancel Call' (with a red 'f' callout).

Referrals

4. **Add Referral**
5. Select up to 5 Needs from the Service Code Quicklist or use the Service Code Look-Up (to search the AIRS taxonomy database).
6. Add Terms & Go To Search Results.

The screenshot shows the 'Service Transactions' tab with a 'Current Call' header. Below the header are buttons: 'Save Needs ONLY', 'Save ALL', 'Clear ALL', and 'Cancel'. The main section is titled 'Add Needs' and contains a 'Needs Assignment' area. A message says 'Select up to 5 Needs'. Below this is a 'Service Code Quicklist' with a scrollable list of service codes and descriptions: Crisis Shelter (BH-1800.1500), Extreme Cold Warming Centers (TH-2600.1880), Extreme Heat Cooling Centers (TH-2600.1900-180), Food Pantries (BD-1800.2000), Homeless Shelter (BH-1800.8500), Low Income/Subsidized Private Rental Housing (BH-7000.4600-450), and Rental Deposit Assistance (BH-2000.7050). At the bottom of the list are buttons 'Add Terms' (with a red '5' callout) and 'Service Code Look-Up'. To the right of the list is a button 'Add Terms & Go To Search Results' (with a red '6' callout).

**If you are unable to find a resource or find an error, please contact 211dupage@dupageco.gov. Include the service code(s) used and the name of the resource(s).*

7. Select the Referral Provider(s) from the Referral Provider Quicklist or from the Search Results.
8. Search results can be filtered by physical location or service area.
9. Results will show the number of needs selected that this provider has a service for. Select the icon under Matched Needs to review.

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Referral Provider Quicklist

7 Provider

▼ Search for Providers

1 These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider Search by adding Target Populations to the Selected Service Terms or by modifying the Service Terms used for the Provider Search.

7 Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																						
+ BEDS PLUS, Inc.	Level 3	708-354-0858 X2#	La Grange, IL 60525	N/A	1/1																						
+ Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)	Level 4	800-941-8681	Villa Park, IL 60181	N/A	1/1																						
+ DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	N/A	1/1																						
+ DuPagePads Interim Housing Center	Level 5	630-682-3846 x1	Downers Grove, IL 60515	N/A	1/1																						

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▼ Search for Providers

1 These Service Terms were used as Search Criteria. If necessary, use this area to perform another Provider Search by adding Target Populations to the Selected Service Terms or by modifying the Service Terms used for the Provider Search.

▼ Refine Search with Service Terms or Target Populations

Selected Service Term	Selected Target Population (Optional)
- Homeless Shelter <input type="button" value="Reset Terms"/>	+ None Selected <input type="button" value="Add to ALL Terms"/>
<input type="button" value="Remove All Terms"/>	<input type="button" value="Add New Term"/>

8 Refine Provider Search Criteria

Search for Providers by using keywords for their Provider Name, AKA, or Description.

Search

Search for Provider based on their Physical Location or the Area Served.

City <input type="text"/>	State <input type="text"/>
County / Parish <input type="text" value="Dupage"/>	ZIP Code <input type="text"/>
<input type="checkbox"/> Community Services Users ONLY	Type <input type="text" value="-Select-"/>

Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
Provider	Type	Phone	Location	Distance	Matched Needs																						
+ BEDS PLUS, Inc.	Level 3	708-354-0858 X2#	La Grange, IL 60525	N/A	1/1																						
+ Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)	Level 4	800-941-8681	Villa Park, IL 60181	N/A	1/1																						
+ DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	N/A	1/1																						
+ DuPagePads Interim Housing Center	Level 5	630-682-3846 x1	Downers Grove, IL 60515	N/A	1/1																						

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10. Select the **Provider Name** and select to the left of the service term to see additional information.

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Provider Profile

AKA: [Redacted]

Description: Provides temporary shelter for individuals and families who are homeless. Residents are required to secure employment, save money toward permanent housing and share in daily responsibilities at the shelter.

Service Information

Note: Unavailable Services are in red.

Primary Services

Service Code	Service Name	Action
BH-0500.3200	Housing Related Coordinated Entry	Add Referral
BH-1800.8500	Homeless Shelter	Add Referral

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Secondary Services

Service Code	Service Name
No matches.	

Contact Information

Provider Telephone Numbers:
Toll-Free: 800-941-8681 (Primary)
Fax: 630-841-8707
Main: 630-941-8681

Provider Contacts:
Hours of Operation: 7 days per week, 24 hours per day
Website: [Click Here](#)

Location Information

Physical: Call for details
Villa Park, IL 60181
[Map Address](#)

County/Parish: Dupage

Mailing: 3130 Finley Road
Suite 520
Downers Grove, IL 60515
[Map Address](#)

County/Parish: Dupage

Referral Data

Needs Referral Date*	Referral Ranking	Projected Follow Up Date	Follow Up User

Referrals

Referred-To Provider

Need Data

11. Skip the section labeled "Referral Data" and move to the Referral table to mark which need is being referred to which resource provider(s) if not already selected.
12. A summary of the provided referrals may be emailed to the client by selecting 'Send Summary' and entering the recipient's email address.
13. Select Save All.

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Selected Providers

Provider ▲	Type	Phone	Location	Last Updated
DuPage CoC HMIS Test Emergency Shelter Project	Level 4	Unknown	Unknown	08/16/2023

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Refer to Providers

11 Referral Data

Needs Referral Date * 10 / 03 / 2023 9 : 51 : 34 AM

Referral Ranking -Select-

Projected Follow Up Date / /

Follow Up User 211 DuPage (8790)

-Select-

Check to notify Community Services Providers by Email.

Referrals **12** Send Summary

Referred-To Provider	Send Provider Summary
DuPage CoC HMIS Test Emergency Shelter Project (8724)	211 DuPage 10/03/2023
	DuPage CoC HMIS Test Emergency Shelter Project
	Addresses: No Address
	Telephone Numbers: No Telephone Number
	Send by Email
	Email Address <input type="text"/> <input type="button" value="Send"/>
	<input type="button" value="Exit"/>

Need Data

Date of Need * 10 / 03 / 2023 9 : 51 : 34 AM

Selected Needs

Need
Homeless Shelter (BH-1800.8500)

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Call Status *

End Call

14. Update the Call Status, which will typically be “Complete”. A Call Status may be left “Incomplete” in the following situations:

- Caller in crisis or dangerous situation.
- Caller extremely confused or having difficulty with understanding referrals.
- Caller requires substantial number of referrals with lots of needs.

15. Save & End Call

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Current Call | Service Transactions

Needs | Referrals | Entire Service History

Previous Referrals

Select Dates: -Select- | Start Date: / / | End Date: / / | More | Search

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
10/03/2023	10/03/2023	DuPage CoC HMIS Test Emergency Shelter Project		Homeless Shelter	Identified	

Add Referral | Showing 1-1 of 1

Add Referral | 15 | Call Status * -Select- | 14 | Save | Save & End Call | Cancel Call

16. If a Call Status is left “Incomplete”, enter a brief note about the interaction and the follow-up need by returning to the “Current Call” tab and using the Call Notes text box.

Age: Unknown | Call Status * Incomplete | Add Referral | Save | Save & End Call | Cancel Call

Current Call | Service Transactions

Call Type * Referral | 16 | Call Notes

Caller Type * Self

Caller Alias

Phone Number