

211 Calls Workflow CS 5.18

211 Calls Workflow Community Services v5.18

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

The screenshot shows the 'Calls' menu on the left-hand side of the interface. The 'Calls' menu item is highlighted with a red circle and the number 1. The 'Call Record Search' form is visible on the right. The form has a search bar with a placeholder 'Type here for Global Search'. Below the search bar, there is a 'Show Advanced Search' button. The form also has a 'Search' button, a 'Clear' button, and a 'Start New Call' button. The 'Start New Call' button is highlighted with a red circle and the number 2. The 'Show MY Calls Only' checkbox is checked.

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

Current Call

The screenshot shows the 'Current Call' form. The form has a header 'Call Record (3977) - 06/18/2026 11:08 AM' and a 'Call Duration - In Progress' indicator. The form contains several fields: 'Caller Name' (First, Middle, Last, Suffix), 'U.S. Military Veteran?' (dropdown), 'Sex' (dropdown), 'Age: Unknown', 'Call Status' (dropdown), 'Add Referral' button, 'Save' button, 'Save & End Call' button, 'Cancel Call' button, 'Current Call' tab, 'Service Transactions' tab, 'Call Type' (dropdown), 'Caller Type' (dropdown), 'Caller Alias' (text field), 'Phone Number' (text field), and 'Call Notes' (text area). The 'Call Type' dropdown is highlighted with a red circle and the number 3. The 'U.S. Military Veteran?' dropdown is highlighted with a red circle and the letter 'a'. The 'Sex' dropdown is highlighted with a red circle and the letter 'b'. The 'Call Type' dropdown is highlighted with a red circle and the letter 'd'. The 'Phone Number' field is highlighted with a red circle and the letter 'e'.

3. Complete as much call data as able.
 - a. Enter the **Caller Name**.
 - b. Choose the Caller's **US Military Veteran** Status from the list.
 - c. Select the caller's **Sex** (as assigned at birth)
 - d. Select **Call Type** and **Caller Type** from the list.
 - e. Enter the incoming **Phone Number**.

211 Calls Workflow CS 5.18

f DuPage CoC 211 (2026)

Mode of Contact with Client	-Select- ▼
Translation Assistance Needed	-Select- ▼
Client ZIP	
Client City	
Caller/Client County	
Caller/Client State	-Select- ▼

- f. Complete additional assessment questions as they appear under **Assessments**. This information is used for reporting purposes for funders and to help us understand who is using this service, and to help identify appropriate referrals.
- Select the **Mode of Contact** from the list.
 - Select if **Translation Assistance** is needed.
 - If yes, choose the **Preferred Language** from the list.
 - If the language needed is not in the list select, “Different language preferred”, and enter the language into the text box.
 - 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.

The following questions are for referral and reporting purposes

Age

To select multiple values hold down the "ctrl" or "cmd" key and click on each value

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

- Enter a numerical value for the Caller's **Age**.
- Select the **Gender** that the caller associates with. If the caller associates with more than one gender, hold down the ctrl key on your keyboard and select each option that applies.

211 Calls Workflow CS 5.18

To select multiple values hold down the "ctrl" or "cmd" key and click on each value

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

- vi. Choose one or more **Race and Ethnicity** values that the caller identifies with. To select multiple values, hold down the ctrl key on your keyboard and select each option that applies.

Are you a caregiver or someone who tends to the needs of an elderly individual or an adult/child with disabilities?	-Select- ▼
---	------------

- vii. Select Yes or No to reflect the caller's response to whether they are a **caregiver or someone who tends to the needs of elderly individuals or an adult/child with disabilities**.

Referred to 211 by	-Select- ▼
If other, referred to 211, please explain	
211 Follow-up Consent	-Select- ▼

- viii. Choose how the caller learned about 211 in the **Referred to 211 by** field. If other, type the response in the text box.
- ix. Select if the caller provided consent for a follow-up call using the **211 Follow-up Consent** field.

- g. Select Save before moving to the next step.

Attachments						
Date Added ▼	Name	Description	Type	Provider	Added From	
Add New File Attachment		No matches.				

4

Add Referral

9

Save

Save & End Call

Cancel Call

Call Status * -Select- ▼

Referrals

4. **Add Referrals** will open a new screen where you will record the Caller's needs, search the resource database for available resources, and select referrals provided to the Caller.

<https://nihmis.cayzu.com/>

Page 3 of 7

6/18/2026

211 Calls Workflow CS 5.18

Current Call | Service Transactions

Save Needs ONLY | Save ALL | Clear ALL | Cancel

▼ Add Needs

Needs Assignment

Select up to 5 Needs

Service Code Quicklist

- 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)
- Dental Deposit Assistance (BU-2800.3350)

5 Add Terms | Service Code Look-Up

6 Add Terms & Go To Search Results

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. Select **Add Terms & Go To Search Results**.

7 ▼ Refine Search with Service Terms or Target Populations

Selected Service Term	Selected Target Population (Optional)	
Homeless Shelter	None Selected	Add to ALL Terms
Reset Terms		Remove All Terms Add New Term

7 ▼ Refine Provider Search Criteria

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

Search Search Hide Advanced Search Options

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

City		State	
County / Parish	Dupage	ZIP Code	
☐ Community Services Users ONLY		Type	-Select- ▼

Search Clear All

7. **Refine Provider Search Criteria** by City, Zip Code, or County. At minimum, limit results to the **County/Parish** of **Dupage** to ensure you are only referring to an approved resource provider. You will need to reselect **Search** to apply the search refinements.

211 Calls Workflow CS 5.18

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	8	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 4	630-682-3846	Wheaton, IL 60187				N/A		1/1						
+		DuPagePads Interim Housing Center (HMIS)											Level 5	630-682-3846 x1	Downers Grove, IL 60515				N/A		1/1						
+		DuPagePads Interim Housing Center-Overflow											Level 5	630-682-3846 x1	Naperville, IL 60540				N/A		1/1						

8. **Search Results** will show the number of needs selected that this provider has a service for under the column labeled **Matched Needs**. Select the icon under **Matched Needs** to review which needs may be met.

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

10

Search Results

#	A	B	C	D	E	F	G	H
	Provider							
+	BEDS PLUS, Inc.							
+	Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)							
+	DuPage CoC HMIS Test Emergency Shelter Project							
+	DuPagePads Interim Housing Center							
+	DuPagePads Interim Housing Center (HMIS)							
+	DuPagePads Interim Housing Center-Overflow							

Bed Availability

Selected Providers

Provider

Refer to Providers

Referral Data

Needs Referral Date *

02 / 12 / 2025

Referral Ranking

-Select-

Projected Follow Up Date

/ /

Follow Up User

211 DuPage (8790)

Search

M

☐ Check to notify Community Services Providers

Provider Profile

Provider Profile - Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES) (Level 4) (#5118)

AKA:

DOJ, Hope House

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	
BH-0500.3200	Housing Related Coordinated Entry	Add Referral
BH-1800.8500	Homeless Shelter	Add Referral

Showing 1-2 of 2

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

9. Select the **Provider** in the **Search Results** to review details about this resource and select  to the left of the service term to see additional information about the service provided.

10. Choose the referral(s) that best meet the caller's need(s) in the **Search Results** by selecting the  to the left of the **Provider**.

<https://nihmis.cayzu.com/>

Page 5 of 7

6/18/2026

211 Calls Workflow CS 5.18

Selected Providers

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

Showing 1-1 of 1

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.

11. Skip the section labeled **Referral Data** and move to the **Referrals** table.

Referrals

Referred-To Provider

Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES) (5118)

12 Homeless Shelter

13 Send Summary

Send Provider Summary

211 DuPage 02/12/2025

Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)

Addresses:

Physical: Call for details
Villa Park, IL 60181

Mailing: 3130 Finley Road
Suite 520
Downers Grove, IL 60515

Telephone Numbers:

Toll-Free: 800-941-8681

Fax: 630-841-8707

Main: 630-941-8681

Send by Email

Email Address **Send**

Exit

12. In the **Referrals** table, mark which need is being referred to which **Referred-to Provider**, if it is not already selected.
13. Use **Send Summary** to email the list of referrals to the caller. There is also an option to print the list of referrals by selecting the printer icon.

Need Data

14 Date of Need * 02 / 12 / 2025 9 : 42 : 29 AM

Selected Needs

Need	15 Amount if Financial	16 Need Status / Outcome / If Not Met, Reason	17 Notes
Homeless Shelter (BH-1800.8500)		Identified -Select- -Select-	

Remove All Needs

18 **Save Needs** **Save ALL** **Clear ALL** **Cancel**

14. **Date of Need** will auto fill with the date and time that the record is being created.

211 Calls Workflow CS 5.18

15. Include an **Amount if Financial**, like when someone needs help with rent.
16. **Need Status/Outcome/If Not Met, Reason** should only be updated if the outcome has been confirmed.
17. **Notes** on each need are optional and only if additional information is needed to be passed on to the **Provider**.
Currently, we are not coordinating referrals with Providers directly through the database.
18. Select **Save All** to save all Need and Referral data entered.

End Call

21 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
02/12/2025	02/12/2025	Catholic Charities, Diocese of Joliet-Kathy Paulsen Hope House Shelter (ES)	Homeless Shelter	Identified		

Add Referral Showing 1-1 of 1

20 Save Save & End Call Cancel Call

19 Call Status * -Select-

19. Update the **Call Status**, which will typically be marked as **Complete**. A **Call Status** may be left as **Incomplete** in the following situations to alert a DuPage County Community Services team member to follow-up with the Caller:
 - 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.
20. Select **Save** if a **Call Status** is left **Incomplete**, otherwise select **Save & End Call** to complete the call.

If a Call Status is left Incomplete

21. Return to the **Current Call** tab.

Current Call Service Transactions

Call Type * Referral

Caller Type * Self

Caller Alias

Phone Number - - x

22 Call Notes

22. Enter a brief note about the interaction and the follow-up need in the **Call Notes** text box.

Support

If you have any questions or experience any issues with

- Use of the database, submit your questions or requests for support at <https://nilhmis.cayzu.com/>.
- Locating a resource or an error in a resource listing, please contact 211dupage@dupagecounty.gov. Include the service code(s) used and the name of the resource(s).