

OFFICIAL

# Homeless2Home System Training

Basic User Training Workbook



Government of South Australia  
SA Housing Authority

Housing SA



## Basic User Training Workbook

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### Introduction

Welcome to the Homeless to Home (H2H) client and case management system!

To learn how to use H2H correctly, please take the time to work through the videos, readings, and activities below. Completion of the full training package will take approximately 7.5 hours. During the training, you will need access to:

- Internet connection
- YouTube.com to watch training videos
- [H2H Training Environment](#) logon details (provided by your manager, or email the support team  
     **Your personal user ID and password **WILL NOT** work in the H2H training environment**)
- [H2H user guide](#) for screenshots and system use guidance
- [Specialist Homelessness Services Collection \(SHSC\) Manual](#) for definitions and national data collection rules
- [H2H support page](#) for the most recent version of this workbook, changes will be made on a regular basis.

We encourage you to note down any questions you have while working through each activity. You can discuss these with a super user, your manager, or contact the support team if you cannot find an answer to your question. Assistance is available via phone, email, or online video conference if needed.

*You can reach the Homelessness Systems Support team on **1300 885 912 – select 3***

*or email [HousingH2H@sa.gov.au](mailto:HousingH2H@sa.gov.au)*

*Mon-Fri, 9am-5pm excluding public holidays*

## Basic User Training Package Activities

Activity	Link	Complete
Introduction to H2H video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Reading – H2H user guide	Read 'introduction to H2H' section, pages 4 – 15 of the H2H user guide	<input type="checkbox"/>
Searching in H2H video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 1	See scenario instructions in the next table	<input type="checkbox"/>
Add Client video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 2	See scenario instructions in the next table	<input type="checkbox"/>
Intake video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 3	See scenario instructions in the next table	<input type="checkbox"/>
Presenting Unit video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 4	(OPTIONAL) See scenario instructions in the next table	<input type="checkbox"/>
Reading – H2H user guide	Read 'Refer client' section, pages 42 – 45 of the H2H user guide. You will not be doing a client referral scenario activity at this point, but can practice referrals in the training environment once you have finished your workbook tasks	<input type="checkbox"/>
Services video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Reading – SHSC Manual	Read 'services and assistance' section, pages 76 – 84 of the Specialist Homelessness Services Collection manual, to familiarise yourself with the definitions for all the different services in the list	<input type="checkbox"/>
Reading – H2H User guide	Read 'service element definitions', pages 186-190 of the H2H user guide and then discuss these with your manager or team leader to learn which ones apply to your agency	<input type="checkbox"/>
Complete Scenario 5	See scenario instructions in the next table	<input type="checkbox"/>
Reading – SHSC Manual	Read 'Examples of how to record living situations' table, page 66 of the Specialist Homelessness Services Collection manual to see examples of how to record different types of situations your clients might be living in	<input type="checkbox"/>
Complete Scenario 6	See scenario instructions in the next table	<input type="checkbox"/>
Assessment video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 7	See scenario instructions in the next table	<input type="checkbox"/>
Reading – H2H User guide	Read 'Assignments' section, pages 177 – 178 of the H2H user guide to learn how to assign a worker to a client	<input type="checkbox"/>
Case Plan video	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
Complete Scenario 8	See scenario instructions in the next table	<input type="checkbox"/>
Complete Scenario 9	See scenario instructions in the next table	<input type="checkbox"/>
Complete Scenario 10	See scenario instructions in the next table	<input type="checkbox"/>

<b>End support/Case exit video</b>	<a href="#">Click here to watch on YouTube</a>	<input type="checkbox"/>
<b>Reading - SHSC Manual</b>	Read 'reason support ended' section, pages 88-89 of the Specialist Homelessness Services Collection manual, to familiarise yourself with the definitions for the reasons for end support	<input type="checkbox"/>
<b>Complete Scenario 11</b>	See scenario instructions in the next table	<input type="checkbox"/>
<b>Complete Scenario 12</b>	See scenario instructions in the next table	<input type="checkbox"/>
<b>Supplementary Activities</b>	See instructions on page 12	<input type="checkbox"/>
<b>Complete final survey</b>	<a href="#">Click here to complete your survey</a>	<input type="checkbox"/>

**Learner name:** .....      **Learner signature:** .....

**Date training package completed:** .....

**Supervisor name:** .....      **Supervisor signature:** .....



## Scenario Instructions

You will be completing all the scenarios below in the [H2H Training environment](#). Check carefully for the 'L plates' (shown above) to make sure you are in the correct environment.

You will need logon details for the training environment. Speak to your manager or contact the support team to access a generic training logon to use\*

*\*Please note - Your regular H2H user ID and password will not work in the training environment.*

***A reminder when working in the training environment that you should never use the information of a real person. Please enter fictional client information only.***

The set of scenarios below will guide you through the process of creating a client, through the support pathway, and then closing the record to exit. Complete the scenarios in the order listed to ensure you are confident in all parts of H2H.

Scenario Instructions	
Number	Details
<b>1: Search for a fictional client</b>	<p>Now that you have learned how to search for a client, log into the training environment, and head to the search page.</p> <p>Think of a name for a fictional client, you will be working with this client throughout all the scenarios below. Complete a search for this person, and make sure there are no clients of that name already in the system. Don't forget to use the 'less is best' method! If you find a match, think of a different name, and search again until you have a unique individual with no matching search results.</p> <p>Write down the name of your client: _____</p> <p>Return to the activity list on page 3 for your next task.</p>
<b>2: Add your client</b>	<p>From your search results page, select the 'add client' button and use the details below to complete.</p> <p><b>Personal Details:</b> Enter a date of birth, DOB status, and sex for your client. Please ensure your client is over 18, as the following scenarios relate to an adult.</p> <p><b>Cultural Identity:</b> Your client is not Aboriginal or Torres Strait Islander. They were born in Italy and arrived in Australia 15 years ago and are now an Australian Citizen. They speak Italian at home but also speak English fluently.</p> <p><b>External agency details:</b> Your client does not provide you with any client numbers for other agencies at this stage.</p> <p><b>Contact numbers:</b> Your client provides you with their mobile phone number, as well as the details of their uncle, who is their emergency contact (enter some fictional names and numbers here).</p> <p><b>Housing:</b> Your client has not shared their housing history with you yet. You will add this information during the intake in the next activity.</p> <p><b>Save and Continue:</b> Select the save and continue button to move to the confirmation page. You may see some possible matches here as the system is</p>

checking the information you entered to ensure you are not entering a duplicate client. If you have searched carefully you should not see any exact matches, as you are adding a new unique client. Select the complete client entry button.

Check the blue 'client details' box at the top of your screen. Your client status should be 'New', and they now have an 8-digit client number.

Record the client number: \_\_\_\_\_

Return to the activity list on page 3 for your next task.

### 3: Intake

While you've been watching the intake video, you have probably been timed out of the training environment. The system will time you out when it has been idle for more than 15 minutes. You will need to log in again to continue with the next activity.

Use the 'search' function to find and open your client, go to the 'intake menu', and open the 'cover page' screen.

Answer the 'Notice of information provision' questions, and then start your intake.

You will need to fill in and confirm all the panels using the information below:

**Intake details:** Your client is currently homeless, having slept rough last night. This morning they spotted your office sign and have walked in looking for help. They tell you that this is the first time they've ever had a housing crisis and they've never been homeless before.

**Housing:** You ask your client about their housing history, and they tell you the following:

- *"I slept in my car last night. I was evicted yesterday, and I didn't know what to do, so I just got in the car and drove. I parked by the beach at Port Noarlunga last night and slept there"*
- *"Before that, I lived alone in a private rental at 10 First Avenue, Glenunga. The lease was in my name. I lived there for 2 months until I was evicted yesterday for not paying the rent"*
- *"Before I lived in Glenunga, I lived with my ex-partner in another private rental property at 63 Madison Avenue, Berri and my name was on the lease. We had lived there for about 10 years"*

Change the radio button under the first housing question to 'select last permanent address' and you can then use the 'add address' button to add an address for each dot point above.

Make sure to think about the timeline of the housing story above and fill in moved in/out dates as accurately as you can with the information you have. \*

*\*Hint - If the client doesn't know the exact date they moved in, you can estimate, or enter the 1<sup>st</sup> of the month. Accuracy for housing dates during support is very important, but where you are capturing historic information, it's ok to put your best estimate.*

Once you've added all 3 addresses, work through the rest of the housing panel, using the radio buttons to select the 'last permanent', then 'presentation' and 'week before' addresses. Your client tells you they haven't been in any of the listed facilities in the last 12 months.

**Income:** Your client tells you that they have been unemployed for several years, so their 'presentation' and 'week before' income details will be the same. They can't

tell you the exact amount, so you enter a rough estimate based on the standard rates from Centrelink. The next payment is due in a weeks' time.

**Education:** You talk about education with your client and they tell you that they have been enrolled in a vocational education course for a year but haven't been attending for the past two months.

**Personal details:** Your client tells you they are not a current or former ADF member. You then discuss disabilities and they advise you that they are hard of hearing, but they don't have difficulty with it as they have hearing aids. They are not receiving an NDIS package.

**Health & Wellbeing:** The client talks about their mental health with you. They disclose they have anxiety and depression, and this was diagnosed by a GP a few years ago. They got some help from the GP when initially diagnosed but are not currently getting any assistance.

**Contact details:** As you only just recorded the contact details in the last activity, you can confirm the panel straight away.

**Presenting issues:** You talk with the client about the main reasons they came in for help, and together you identify these as:

- Housing crisis (the main presenting issue)
- Financial difficulties
- Mental health issues

Complete your intake and answer the 'presenting unit' questions (your client is presenting alone).

Return to the activity list on page 3 for your next task.

#### 4: Presenting units (OPTIONAL)

**Optional Activity:** *This activity is not critical to the rest of the scenarios, but if you routinely work with groups of people or with families, and would like to practice putting a presenting unit together you can complete the scenario below.*

In order to put a presenting unit together, you will need at least two client records, both with an intake done. Using the previous videos and scenarios as a guide, add another new client to the training environment, ensuring that you complete a search, add the client, and complete an intake. You can use this activity to imagine a client with circumstances like your agency's target cohort and complete the intake with that in mind.

Once you've completed the intake for this new client, you can follow the instructions in the presenting unit video to make this new client a member of your main scenario clients presenting unit.

Return to the activity list on page 3 for your next task.

#### 5: Services

Return to your **original** scenario client whose name and client number you have noted above. Go to the 'services' screen in the intake menu.

Read through the client interactions below and record a service for each dot point. You will need to decide the delivery type, the service, and the service element\*.

Remember the service definitions you read in the SHSC manual and choose the most specific service possible, to try and match the real-life support work to the data.

This exercise is designed to help you explore the many different service types available in the list. You can contact the support team if you need assistance with this exercise or want to check your work.

*\*Please note - for services requiring a service element use 'in centre support' or 'General Assistance and support' element or talk with your manager/super user about what you would use if this client were working with your agency in real life.*

**Add a service(s) for each of the following examples:**

- Your client needs emergency accommodation, so you contact your local SA Housing Authority office (Housing SA) to advocate for motel assistance
- The request is approved, and your client is granted 3 nights at a local motel funded by SAHA
- Your client tells you they were recently cut off by Centrelink for failing to meet their mutual obligation tasks. Together you contact Centrelink and get the payments re-instated
- The client asks for help with collecting some belongings from the property they were evicted from so you transport them to the house in a work vehicle and assist them to pick the items up
- You have been trying to find a vacancy in transitional housing for the client to move to from the motel but have been unsuccessful. At this stage you don't have anywhere for the client to move to from the motel, so their need will be unmet
- You've discussed mental health supports with the client, and reached out to some local providers, but none are currently taking on new clients, so their need will be unmet until you can find a provider taking referrals
- You have a discussion with your client about their vocational study and together come up with a plan to get them re-engaged in their education

Return to the activity list on page 3 for your next task.

**6: Updating housing situation**

Updating your client's housing situation during their support period is an important part of their support pathway.

You can update your clients housing situation at any stage in the client pathway. All addresses are kept in the housing screen, with the ability to record the duration of the client's stay at that address using the moved in/moved out date fields. The client's most recent 'current address' will be displayed at the top of this list in bold type. You can only have one open current address at a time.

To update the client housing situation, you will need to close the most recent current address by adding a 'moved-out' date before you add the new address. Previous current addresses are also displayed, to be able to review the historic housing situations for the client, in order to assess outcomes over time.

Head to the housing screen in the client menu and update your client's current housing situation, adding a 'moved out' date to the motor vehicle address, and then adding a new address\* to reflect that they are now staying in a motel. The 'moved-out' date for the motel address should remain blank, as you don't know at this stage how long the client will remain the motel.

*\*Please note - you can use a fictional address for the motel*

Return to the activity list on page 3 for your next task.



<p><b>7: Assessment</b></p>	<p>Open the Assessment menu and select the 'cover page' screen. From here you can start the assessment for your scenario client. Using the information below, assess your three presenting issues, and locate and complete the two new issues.</p> <p><b>Housing Crisis:</b> The client tells you some more about their housing history. They advise that they were evicted from their last private rental for rent non-payment. After ending things with their ex-partner back in Berri, the client struggled to afford the rent on their single Centrelink income, and are now in \$2000 rental arrears.</p> <p><b>Financial issues:</b> The client is struggling to meet all their financial commitments on their unemployment payment and is spending more than they earn most fortnights and would like some help with learning some budgeting skills.</p> <p><b>Mental health issues:</b> Anxiety and depression has been a struggle for the client for several years now, but the client tells you that it's been particularly hard since ending their relationship back in Berri. They tell you that they haven't spoken to anyone about their mental health in over a year and would like some help to deal with their anxiety and depression.</p> <p><b>Problematic alcohol use:</b> The client discloses that since ending the relationship with their ex-partner, they've been drinking heavily, most nights getting through 2 bottles of wine. The client describes the drinking as the 'only thing keeping me sane' and states that they don't think they can stop or reduce yet.</p> <p><b>Domestic and family violence:</b> When asked about how the relationship ended, the client explains that their ex-partner had become abusive, and that fearing for their safety, they broke it off with them and moved to the house in Glenunga 2 months ago. The client states that they don't believe their ex will follow them to Glenunga, and that they feel safe and don't want to engage with any domestic violence counselling at this point.</p> <p>Once you've recorded all this information into your assessment, you can 'save and complete' it.</p> <p>Return to the activity list on page 3 for your next task.</p>
<p><b>8: Case plan (structure)</b></p>	<p>Before you can start a case plan, you will need to be assigned as the case manager. Normally this would be done by a team leader/manager at your agency, so you can ask them for assistance if you need some help. In the training environment you can do this yourself. Head to the 'assignments' screen in the client menu, your training logon will already be listed there as a case worker, you can edit this using the pencil icon to change the role to case manager.</p> <p>Now you've assigned yourself as a case manager, you can start your case plan, fill in the necessary mandatory fields, and move any unmet needs through into the appropriate areas of the case plan by selecting 'include and close'.*</p> <p><i>*Hint - if you have completed 'scenario 5 – Services' correctly, you should have two unmet needs present to move into your case plan.</i></p> <p>Take some time to click through your case plan and look at each issue present. You should have 5 issues, across 4 life domains.</p> <p>Proceed straight to Scenario 9.</p>
<p><b>9: Case plan (services)</b></p>	<p>Read through the client interactions below and record a service for each dot point. You will need to decide which issue in your case plan to record the service within, the delivery type, the service type, and the service element*. Remember the definitions you read in the SHSC manual and choose the most specific service possible, to try and match the real-life support work to the data.</p>

*\*Please note - for services requiring a service element use 'in centre support' or 'General Assistance and support' element or talk with your manager/super user about what you would use if this client were working with your agency in real life.*

Add a service for each of the following examples:

**Alcohol issues:**

- You have a discussion/informal counselling session with your client about reducing their alcohol use
- You contact Drug and Alcohol Services of South Australia (DASSA) to seek some formal counselling for your client
- Your client is accepted into a six-week alcohol-counselling program with DASSA

**Domestic and Family Violence:**

- Your client decides they are ready to talk to someone about their abusive ex-partner. You liaise with the local domestic violence agency to arrange a time for them to meet with your client
- Domestic violence counselling is arranged with the Southern Adelaide Domestic Violence service. They ask you to send them a service referral on H2H for the first appointment

**Financial Issues:**

- You identify that your client needs immediate financial counselling – however when you contact the local counsellor, discover that there are no appointments available and you're told to try again in 6 weeks
- You work with your client to put together a simple budget to tide them over until formal counselling can be accessed

**Housing Crisis:**

- A vacancy arises with a local community housing provider for transitional accommodation. Your client is accepted for the property, and signs a 3-month lease
- Now that your client has medium term/transitional accommodation, you identify that they will need long term housing in the future but there is currently nothing available

**Mental Health Issues:**

- You contact a local GP on behalf of your client to arrange an appointment so they can start getting some help with their anxiety and depression
- Your client then attends the appointment at the GP to get a mental health care plan.

**Living Skills\***

*\*Hint - you don't have this issue in your case plan yet. Use the 'add strengths/issues' button to add a new issue and then add these services to the new issue*

- You talk about household management strategies with your client before their house inspection, so that they will feel confident they are maintaining the property as expected

	<ul style="list-style-type: none"> <li>You provide your client with a \$20 Woolworths Voucher to purchase some cleaning products</li> <li>Your drive your client to the supermarket to buy the cleaning products</li> </ul> <p>Proceed straight to Scenario 10.</p>
<p><b>10: Updating housing situation</b></p>	<p>With your client being moved from the motel to transitional housing, their housing situation has changed again.</p> <p>Head to the housing screen in the client menu, and update your client’s current housing situation, adding a ‘moved out’ date to the motel address, and then adding a new address* to reflect that they are now staying in transitional housing. The ‘moved-out’ date for the transitional housing address should remain blank, as you don’t know at this stage how long the client will remain there.</p> <p><i>*Please note - you can use a fictional address for the transitional housing.</i></p> <p>Return to the activity list on page 4 for your next task.</p>
<p><b>11: Preparing case plan to close</b></p>	<p>We will now fast forward our fictional client and imagine it is 12 months into the future. You and your client have together managed to achieve all the client’s goals, their issues are resolved, and you are preparing to wrap up your case management and get them ready to exit.</p> <p>Before the case exit can be completed, you will need to get the case plan ready to close off. *</p> <p><i>*Please note - in a real life situation, most of your services will have closed themselves by passing their end dates, or for referrals, been accepted and closed by the consented agency, but for training purposes you may need to adjust some end dates back to today’s date so that you can close them, and withdraw any pending referrals.</i></p> <p>Complete the following:</p> <ul style="list-style-type: none"> <li>Close any open provided services</li> <li>Close any unmet needs</li> <li>Withdraw any pending referrals</li> <li>Once all services are complete, close off each issue</li> <li>Once all the issues are closed, you should have green tick icons for each, with a status of ‘Goal met’</li> </ul> <p>You should now be ready to exit your client.</p> <p>Proceed straight to Scenario 12.</p>
<p><b>12: Case exit/end support</b></p>	<p>It’s now time to complete a ‘case exit’ for your scenario client to close their record. Using the information below record the outcomes at the end of support, remember you need to go to the case plan ‘cover page’ screen to start your case exit.</p> <p><b>Case exit details:</b> Your client is no longer in crisis, has resolved their issues and have achieved all their case management goals. They have not been homeless in the last month* and are not homeless on exit.</p> <p><i>*Please note – don’t forget that we are imagining that we have been working with this client for 12 months now, so answer the questions with that in mind.</i></p> <p><b>Housing:</b> The client has moved out of the transitional housing property and is now leasing a private rental unit at 6/24 Smith Street, Hackham, so you should update</p>

your current address with a moved out date, then add the new address for selection as the 'address on exit'.

**Income:** With your support, your client gained a part time job, and they now earn \$750 a fortnight in employee income. They still receive about \$300 a fortnight in government payments for their Newstart/Jobseeker payment.

**Education:** The client has re-engaged in their vocational education and are now attending regularly.

**Personal Details:** The client's contact details have not changed and don't need to be updated.

**Risk Assessment Scores:** As the client's DV wasn't current while you worked with them, they have never had a DV risk assessment, so the score doesn't need to be updated.

Once all your panels have been confirmed, complete your case exit, then head back to the case plan cover page and close your case plan. Your client status should change to inactive.

Continue to the Supplementary Activities Below.

## Supplementary Activities

Activity	Instructions
Sensitive and Locked Video	<a href="#">Click here to watch on YouTube</a>
Reading – H2H user guide	Read 'System Closes' section, page 157 of the H2H user guide to learn about System closes and how to avoid them occurring
Reading – H2H user guide	Read '3: Add a client based on another clients record' section, page 22 of the H2H user guide to learn about creating a new draft client based on an existing client record
Reading – H2H user guide	Read 'Unassisted History' section, page 47 - 48 of the H2H user guide, to learn how to capture clients who present for assistance but cannot be assisted or refuse assistance
Reading – H2H user guide	Read 'The Client Menu' section, page 30 - 46 of the H2H user guide, to learn about the different screens in the client menu, and how to update them
Set Deceased Video	<a href="#">Click here to watch on YouTube</a>
Reading – H2H user guide (OPTIONAL)	If you have Agency Manager level access to H2H, read the 'Agency Manager Functions' section, pages 170-184 of the H2H User guide to understand the additional features available to this access level

All Basic User package activities should now be complete. Have your supervisor/manager sign off on page 4 that all your tasks have been completed, and complete the [training survey](#) to provide your feedback

A reminder, that you can reach the Homelessness Systems Support team on **1300 885 912 – select 3**

or email [HousingH2H@sa.gov.au](mailto:HousingH2H@sa.gov.au)

Mon-Fri, 9am-5pm excluding public holidays