SA Housing Authority

Government of South Australia

homeless2HOME

User Guide

updated March 2023 for H2H version 2.17

Assistance with H2H

Users who need help with H2H should first check the relevant section of this guide, read through the supporting documentation on the support page (by clicking the H2H support link at the bottom of every page of H2H), or ask a super user, or manager.

For technical help with any system errors please contact Operations support on **1300 885 912 (press 2)** or email HousingOperationsSupport@sa.gov.au

For assistance with training related enquiries, contact the H2H Support team on **1300 885 912 (press 3)** or email HousingH2H@sa.gov.au

> ***Please note:***
>
> *All client examples contained in this user guide are fictional and not based on any true client information. Any similarity to true client records is coincidental*

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homeless2HOME

Introduction

updated March 2023 for H2H version 2.17

About the Homeless2Home System

The Homeless2Home Client & Case Management System (H2H) is a web-based application released as part of South Australia's implementation of the National Partnership Agreement on Homelessness (NPAH) in 2011.

H2H was developed to provide a single, state- wide, case management and information management system. H2H benefits both clients and agencies by:

- enabling clients to access assistance through any agency so there is no wrong door
- ensuring clients only tell their story once
- creating easier entry and referral pathway into the support sector for clients
- reducing the reporting burden for agencies
- providing a standardised framework for case management by agencies and;
- Supporting consistent support responses for clients.

This user guide is provided to assist you in understanding how to use H2H.

H2H support page

A support page for the H2H system can be found by clicking the H2H support link at the bottom of every screen of H2H,

The H2H support page contains valuable information regarding:

- Updates to the system
- Training materials (including this manual)
- How to get access to H2H
- Information on client consent
- Forms
- Data collection information, and
- Where to find help

The H2H support page is updated with new information regularly and should be your starting point for assistance.

About the Specialist Homelessness Services Data Collection

H2H is accredited as an approved client management system for the National Specialist Homelessness Services collection (SHSC). All client data required for the SHSC is obtained from H2H. Client information is depersonalised, and extracted for submission to the Australian Institute of Health and Welfare (AIHW) at the specified date for transmission each month

For information on the SHSC, you can visit the AIHW's website at www.aihw.gov.au/

Information from H2H is also utilised for State Reporting, managed by the South Australian Housing Authority, allowing agencies to be provided with additional reports to aid in performance monitoring processes. Agencies are provided with quarterly Key Performance Indicator and Contract Management reports, in addition to statistical summaries provided by the AIHW.

Getting Access

Access to H2H is restricted to workers of agencies funded to provide specialist homelessness services in South Australia. Due to the highly sensitive nature of client information on the H2H System, access is controlled by the South Australian Housing Authority. For access, complete and return a New User Agreement form found on the support page (by clicking the H2H support link at the bottom of every page of H2H).

Security

As H2H stores sensitive information about clients, security measures are in place to prevent unauthorised access and protect client information.

System security

The web entry point for the H2H system is housed in the Department of Justice Web Vault, protected by firewalls to prevent unauthorised access. Other parts of the system run on servers that are housed behind Firewalls. All firewalls are monitored constantly and tested regularly. All data in the H2H system is encrypted while stored and when transmitted.

User security

All users complete a signed and authorised agreement, before being granted access to H2H. The conditions for use of the system can be found on the user access form. These controls ensure that no one has access to client information without the appropriate authorisation.

Access to H2H is password protected. A unique username and temporary password are provided to you when the account is created.

Your password should never be shared with anyone to ensure client information is protected. Passwords should not be stored in your web browser but should be typed into the system each time you log on. Access to data within the system is audit logged to ensure the system administrator can track who reads or updates client data. Data audits will be carried out at times to ensure all users are using the system in line with conditions of use.

Client security

Visibility of client personal information in H2H is dictated by a consent function. The information that you can view on a client record where you do not have any consent is limited to:

- Client name
- Sex
- Date of Birth
- Any previous supporting agencies through the client ‘pathway’
- Consents
- Presenting unit
- Alerts

This restriction provides protection for client information held by your agency.

Consent and information sharing

Clients must be provided with the Notice of Information provision at the start of their support. This document outlines the client's rights regarding their personal information. You can find a copy of this document by following the link on the intake screen, or by visiting the support page.

Freedom of information

Clients have a right to access the information held about them. Clients also have a right to request the amendment of their client record if it is inaccurate, incomplete, irrelevant, out of date, or would give a misleading impression. The agency that collected the information is responsible for providing it to the client. If the agency is no longer operational the client can make a freedom of information request to the South Australian Government.

Tips for Navigating H2H

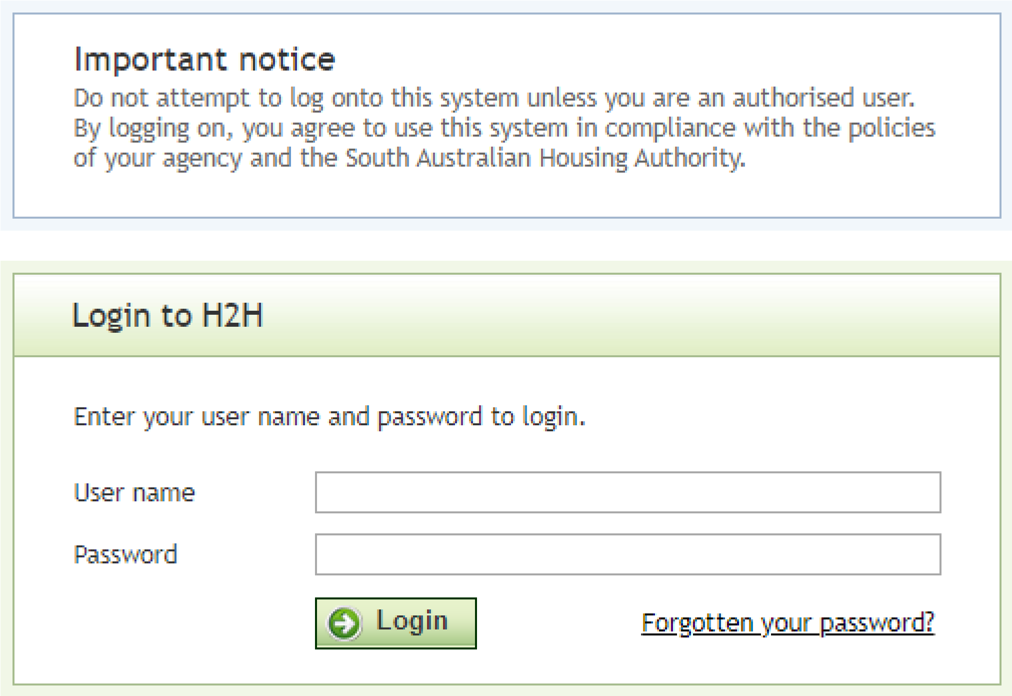
Below is some general information about using H2H;

H2H Tips	
Single clicks	All buttons and fields in H2H can be accessed with a single click. A double click will load the page/field twice, slowing down system speed
Browser links	A link to the logon screen can be saved in your web browser favourites for quick access
Back button	The ‘back’ button on an internet browser won't work in H2H. You will be automatically logged out of H2H if you click the back button. This function exists to protect the security of client information on H2H.
F11	To avoid accidental use of the ‘back’ button on your browser, you can enter full screen by pressing the F11 key on your keyboard
Copy/Paste	the ‘right click’ mouse menu functions to cut, copy and paste don't work in H2H. To copy/paste information use the Ctrl C (copy) and Ctrl V (paste) functions on your keyboard
20 Minute timeout	There is a 20-minute timeout function in H2H. If the system is idle (no buttons are selected) for 20 minutes, you will be automatically logged out. This function exists to protect the security of client information on H2H.
Mandatory Fields	A yellow field indicates that the field is mandatory. You will not be able to proceed without entering valid information. Attempting to do so will result in a red text error message at the top of the screen, telling you what has been missed.
Tool Tips	If you are unsure of the meaning of an icon in h2H you can hover over it and a tip will be displayed
Information bubbles 	Information bubbles can be hovered over for more information about the question.

Logging in to H2H for the first time

Once you've been given access, you will receive a user name and a temporary password to start the account activation process. User names and passwords are case sensitive.

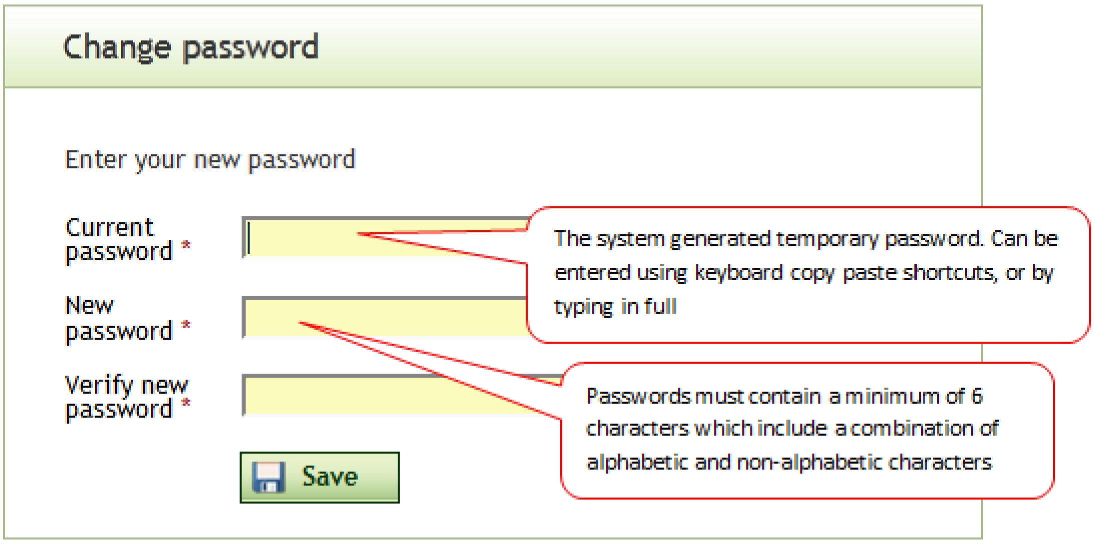
On the logon screen, enter your user name and temporary password, and then select the ‘Login’ button, as seen below;



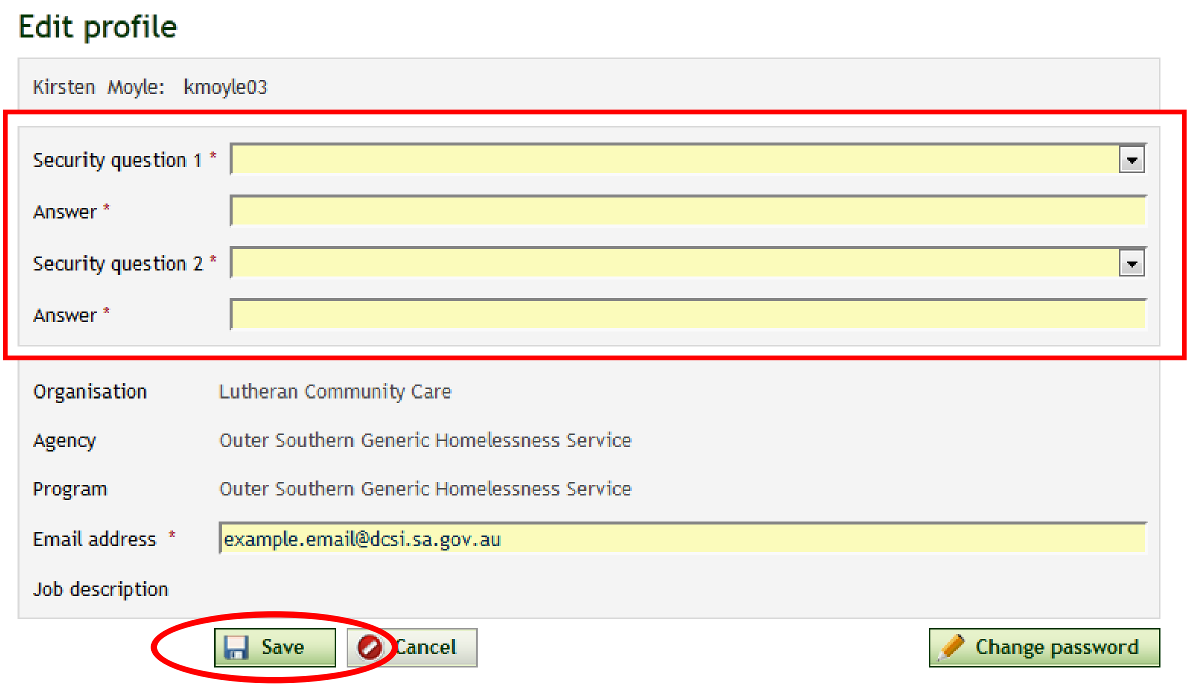
Please Note:

User name and Passwords are case sensitive, always check that your caps lock key is not on before logging in

On the next screen you will be prompted to change your password.



Once you have saved your new password you will be prompted to select two security questions and enter the answers.



These security questions can be used to reset your password if you forget it. Once you have completed all required fields, select the save button. This will take you to the homepage for your agency.

Levels of access

H2H has four levels of access. These levels control the information and functions you have access too. Your manager will choose your access level, and it will not necessarily be the same as your job title or role.

Other worker:

You can perform the basic functions of adding, intaking, referring or closing a client record. This role is suitable for workers such as administration and front desk workers within agencies.

Case worker:

You can access most features of H2H however cannot open a case plan or add issues or goals within a case plan.

Case manager:

You can access all client features of H2H including the creation, management and closure of client case plans.

Agency manager:

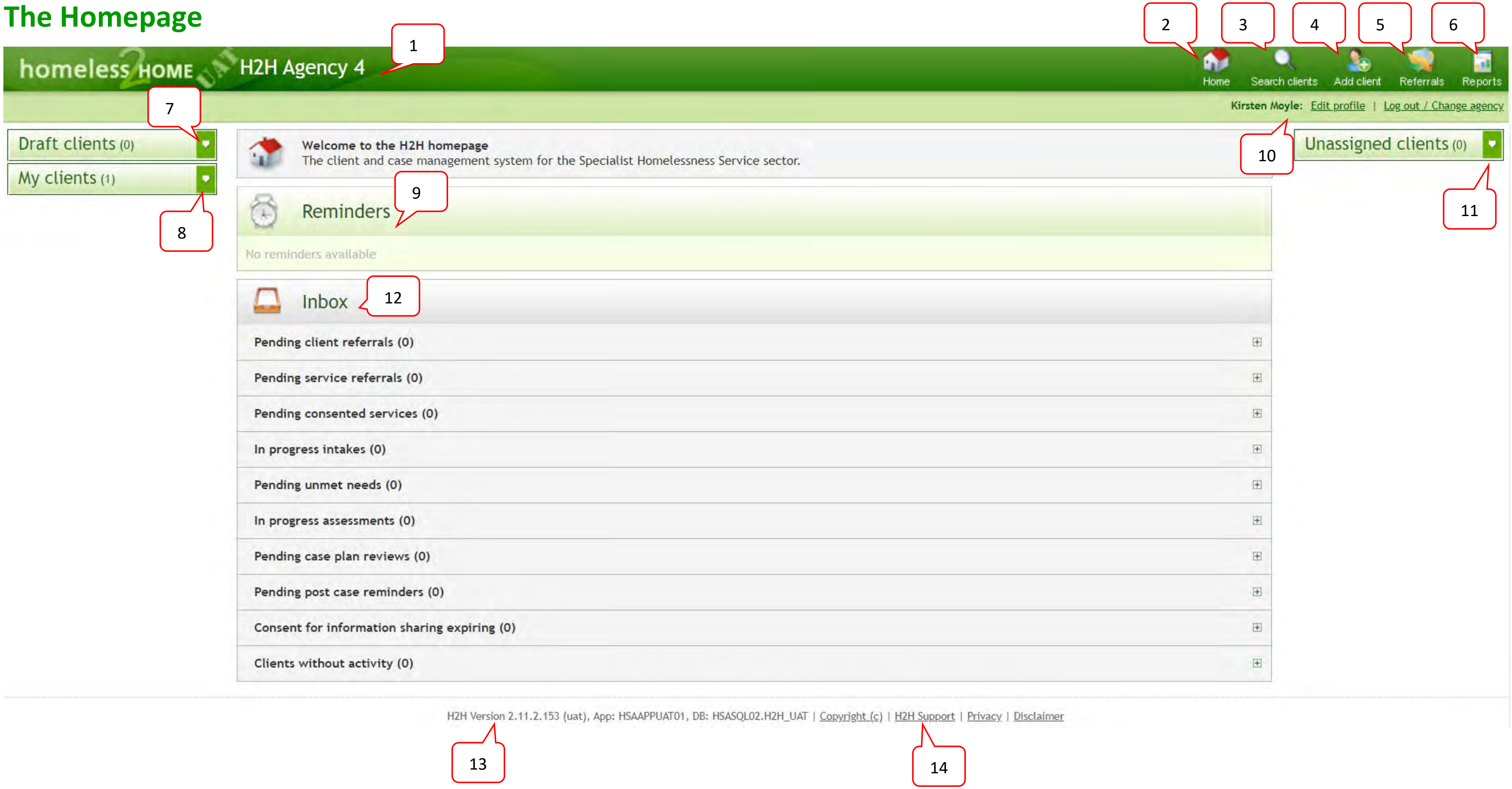
You can access all features of H2H as well as the ability to assign clients to workers, access the referral menu and the ability to view and print agency reports.

User roles and functionality

	Other worker	Case worker	Case Manager	Agency Manager
BASIC FUNCTIONS				
Search for a client	✓	✓	✓	✓
Edit client personal details	✓	✓	✓	✓
Add consent to a client	✓	✓	✓	✓
Add notes to a client	✓	✓	✓	✓
View the client pathway	✓	✓	✓	✓
Set client as unassisted	✓	✓	✓	✓
INTAKE				
Complete an Intake	✓	✓	✓	✓
Add/repeat a service	✓	✓	✓	✓
Edit a Service	✓	✓	✓	✓
Send a service referral (intake)	✓	✓	✓	✓
Add a presenting unit	✓	✓	✓	✓
ASSESSMENT				
View an Assessment	✓	✓	✓	✓
Complete an Assessment		✓	✓	✓
CASE PLAN				
View/Open Case Plan			✓*	✓
Add an issue/strength to a Case Plan			✓*	✓
Add/repeat a service		✓*	✓*	✓
Send a service referral		✓*	✓*	✓
Edit/close a service		✓*	✓*	✓
Close an issue			✓*	✓
Create a Case Exit			✓*	✓
END SUPPORT				
View an End Support	✓	✓	✓	✓
Complete an End Support	✓	✓	✓	✓
REFERRALS				
Send a client referral	✓	✓	✓	✓
View/accept/reject incoming referrals				✓
ADMIN TOOLS				
View/Print reports				✓
Assign/Reassign workers to clients				✓
Set client as Sensitive/Locked				✓
Set client as deceased				✓
View unassigned clients list				✓

* The ability to perform these functions is based on worker assignments

The Homepage



The H2H Homepage		
1	**Agency Name**	Displays the Agency that the you are currently logged into
2	**Home screen button**	Will return you to the home screen from anywhere in the system
3	**Search screen**	Navigates to the search screen to search for a client record in the H2H system
4	**Add Client screen**	Navigates to the create new client screen
5	**Referrals screen**	Available only to Agency Managers. All incoming and outgoing service and client referrals can be viewed and actioned from this page. Also contains a referral search function
6	**Reports screen**	Available only to Agency Managers. Several reports about client status, workloads and other information can be downloaded from this screen
7	**Draft clients**	Lists any client records for the agency that are still in draft status (add client process has not been completed)
8	**My clients menu**	Displays clients that are assigned to you as either case worker or case manager
9	**Reminders**	Displays reminders due today, and this week, where there are incomplete actions for assigned clients, like intakes, assessments, or consents reaching their end date. Agency managers will see reminders for all agency clients.
10	**Edit profile and log out/change agency button**	View and edit your profile details like security questions, email address and password. The log out button logs you out of H2H. If you have access to more than one agency, you can use this button to change between them.
11	**Unassigned clients list**	Available only to Agency Managers. Displays all clients who are not currently assigned to a worker
12	**Inbox**	Displays information about all pending action for your assigned clients, including unmet needs, pending referrals and consented services, case plan review dates, post case reminders and clients without activity. Agency managers will see information for all agency clients*
13	**Version number**	Displays current version number information for H2H
14	**SA.Gov links**	Links to copyright and privacy information on the SA.Gov website, and the H2H support page where users can find help and training information

*more information about the inbox is located on the next page

The Inbox

In the inbox you can see information about all pending items for your assigned clients, including unmet needs, pending referrals and consented services, case plan review dates, post case reminders and clients without activity.

> ***Please Note:***
>
> Information displayed in the inbox is determined by your access level. Agency managers will see information for all clients of the agency, and lower level workers will see only clients that are assigned to them.

Each inbox menu item can be expanded and the items within can then be opened via the hyperlinked client name.

The Inbox	
Pending client referrals	Displays outgoing client referrals that have not been actioned by the receiving agency
Pending service referrals	Displays outgoing service referrals that have not been actioned by the receiving agency
Pending consented services	Displays services that you have provided as a consented agency, that have not been acknowledged by the lead agency
In progress intakes	Displays clients where an intake has been started but not completed. Reminders will display when it has been more than 7 days since the intake was started. An intake must be completed within 28 days from creation. If it is not

	completed within this period, the intake will be closed as incomplete, and the client record set to inactive.
Pending unmet need	Displays clients who have a current unmet need for a service
In progress assessments	Displays clients where an assessment has been started but not completed. Reminders will display when it has been more than 7 days since the assessment was started. An assessment must be completed within 28 days from its creation.
Pending case plan reviews	Displays clients with an upcoming case plan review scheduled. Review dates can be set from the case plan cover page in the client record
Consent for information sharing expiring	Displays clients with an existing consent to share information, which is due to expire
Clients without activity	Displays client records with no activity this month. Two types of alerts appear in this menu; 1. Casual or assessed clients with no activity for a full calendar month; • At the end of the month, these clients will be automatically closed by the system and their record set to inactive. This is known as a 'System Close' 2. Case managed (Active) clients, whose case plans have not been updated for 30 days • An alert will display for case managed clients who have not had activity recorded for a full calendar month. • Activity consists of adding a service to the case plan • These clients will not be automatically closed due to inactivity.

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Searching and Adding Clients

Searching in H2H

A thorough search on H2H **must** be completed before adding a new record. Adding a client that is already on H2H creates a duplicate record that in most instances can't be deleted.

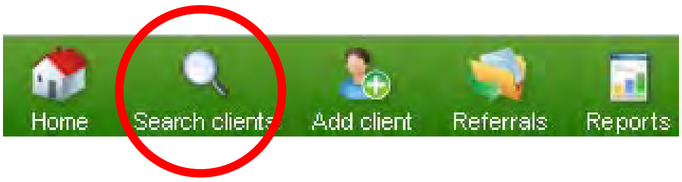
Performing a search

When searching for a client use minimal information. The search function only returns search results that match the exact combination of information you entered, so being too specific can prevent you finding a possible match. Searching using minimal information is called the *less is best rule*.

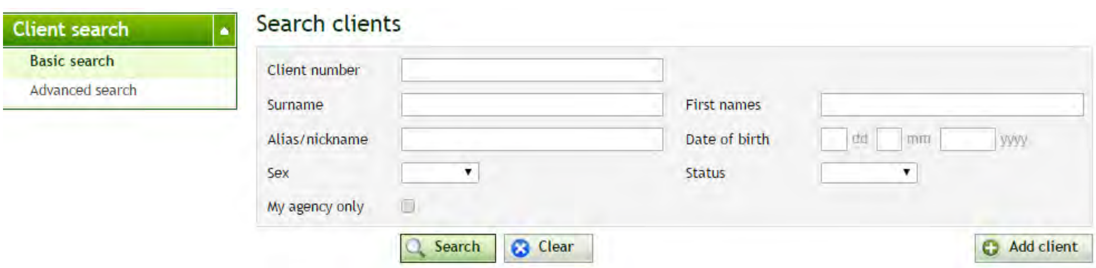
> ***Less is best rule****:*
>
> *Client John Smith, born 20/09/1967 has presented at your agency. Rather than searching for all of these terms you should search using only the first initial, and last name.*
>
> *If this returned a large number of results you could then add in the full first name to narrow the results.*
>
> *If there were still a number of matching clients, you could then add the year of birth to narrow the results down even further.*

The search function

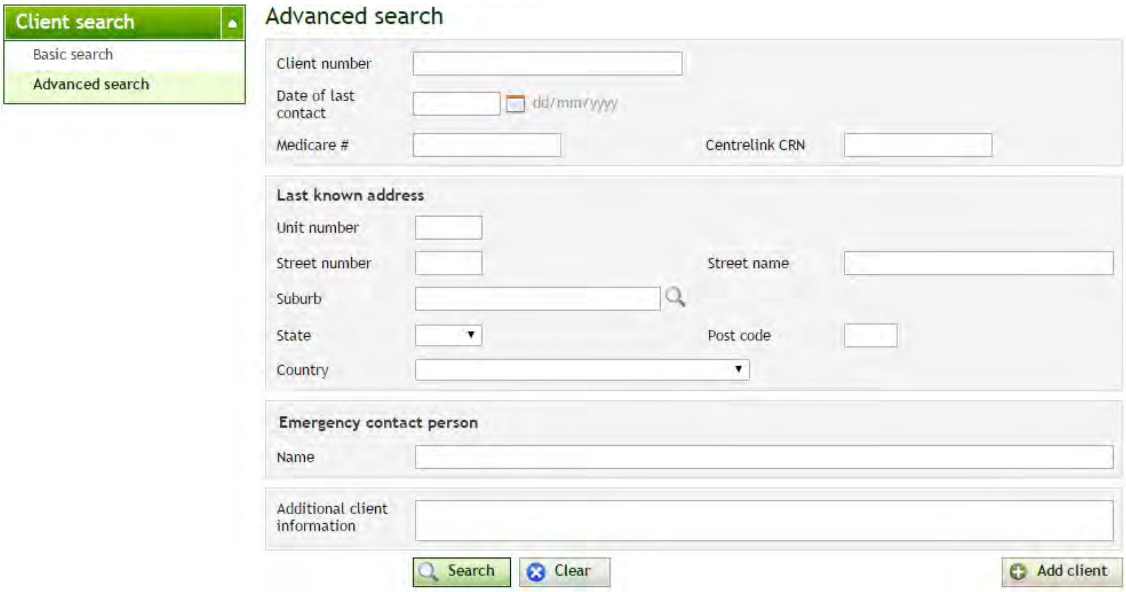
To perform a search, click the '*search clients'* icon located in the top right-hand corner of the home screen.



There are two options for completing a search on H2H. The *Basic Search*, which appears as follows;



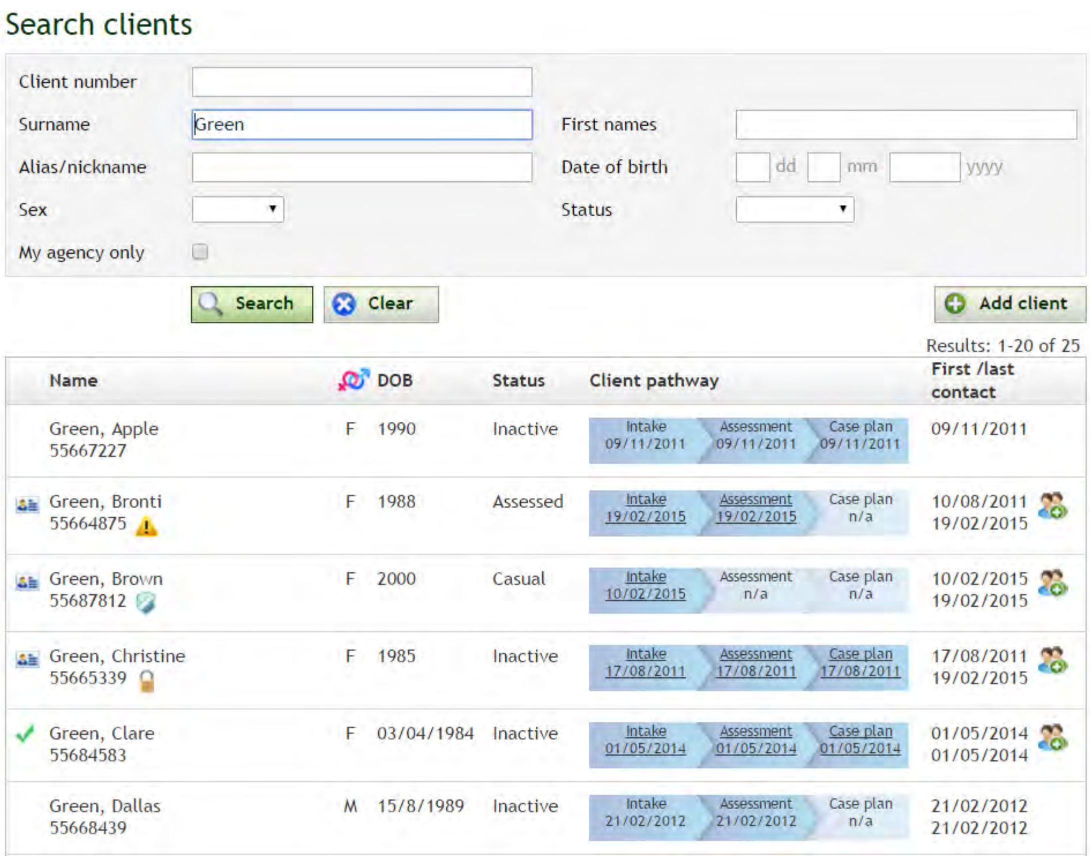
Or the *Advanced Search*;



Most existing client records can be successfully located using the Basic search function.

About the Search Screen

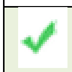
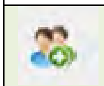
Once you have entered your search terms, and selected the search button, the search results are displayed. For example;



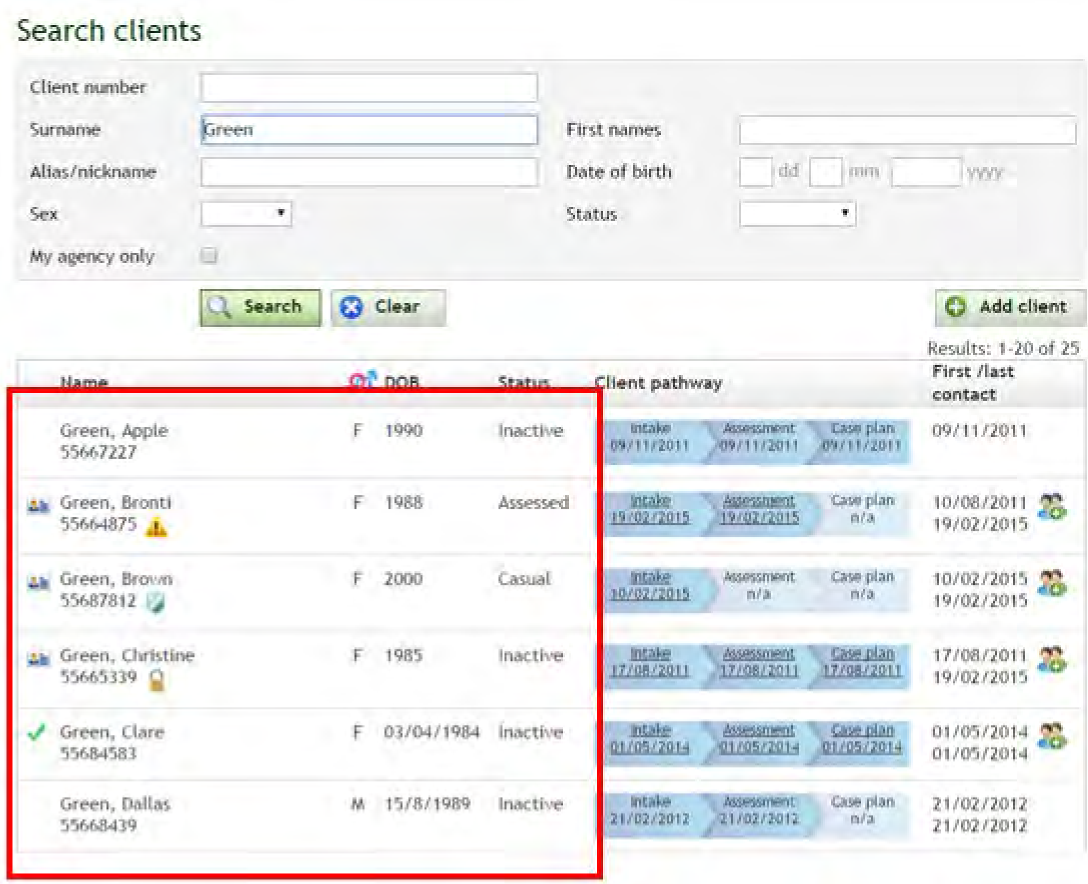
As shown in the example above, results are alphabetically listed, and client information can be seen including name, sex, DOB, client status, most recent client pathway, and first and last dates of contact.

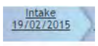
> ***Search by Assigned Worker***
>
> *For those users who have agency manager level of access, the search function will also allow searching by assigned worker. See the [Agency Manager functions] section for further detail*

Icons on the screen also give information about the client;

Search Screen Icons		
	**Lead Agency**	Indicates that your agency is the current or most recent lead agency.
	**Consented Agency**	Indicates that there is a current consent for your agency to view parts of the client's record
	**Alert**	Indicates an alert exists on the client's record. You can view the alert by clicking on the record to open the client summary page. See the 'Alerts' section to learn how to add an alert
	**Sensitive**	Client is set as sensitive. This icon (and client record) is only visible if you are a lead or consented agency. See the 'Sensitive and locked' section for more detail
	**Locked**	Client is set as locked. This icon (and client record) is only visible to the Agency manager of the lead agency, and any worker (lead or consented) who has been assigned to the client. See the 'Sensitive and locked' section for more detail
	**Add a draft client based on this clients' record**	Starts a new client record based on the details of this client's record. This function copies over information regarding country of birth, surname and addresses to a new client record, saving time for the user when adding multiple family members to h2H. See the Adding a new client section for more detail

To open a client record to view, use a single click anywhere in the white sections of the search results'



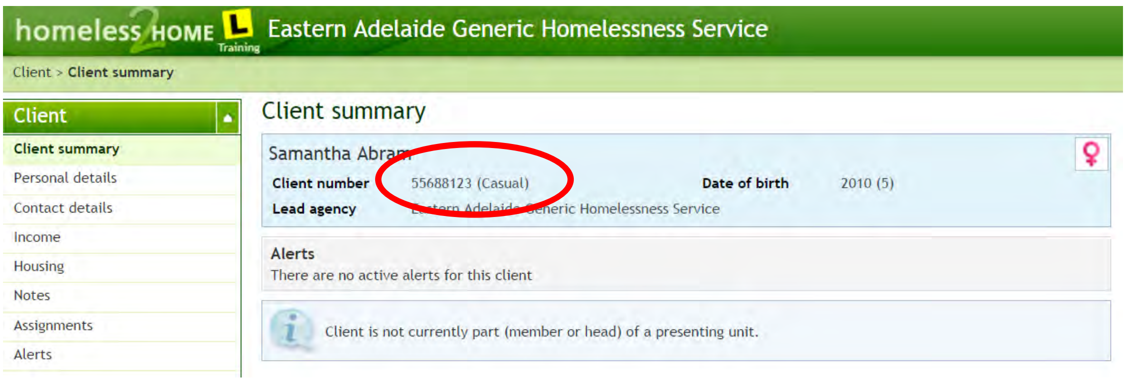
An underlined entry in the client pathway 

indicates that you have consent to view that information. Clicking directly on an underlined item, e.g. Intake, Assessment, Case plan, will redirect you to the cover page of that pathway entry to view further information.

Clicking on a pathway item where you do not have consent will direct you to the client summary page, however visible details will be minimal.

The client status

Every client record in H2H has a status, displayed alongside the client number, and in the status column on the search results screen. The client status indicates what stage the client is at in their pathway.



Client status definitions	
Draft	A client is part way through the 'add client' process but has not yet been saved
New	A client has been added to H2H but has not yet had any activity (Intake, Assessment or Case Plan)
Casual	A client has a completed Intake, but an assessment has not yet been done
Assessed	A client has undergone an assessment but does not yet have a case plan
Active	A client has an active case plan
Inactive	A client's support has ended, and record closed using the end support or case exit function *OR* The record has been auto-closed by the system due to inactivity
Unassisted	A client has been recorded as unassisted after presenting to an agency and not receiving a service.

Next steps after searching

Once you have completed follow the instructions below to continue.

Where to next?	
No records exist for the client	Continue to the Add client section
You found a match with inactive or unassisted status	Continue to the Intake section
You found a match with casual, assessed or active status	Contact the current lead agency to discuss

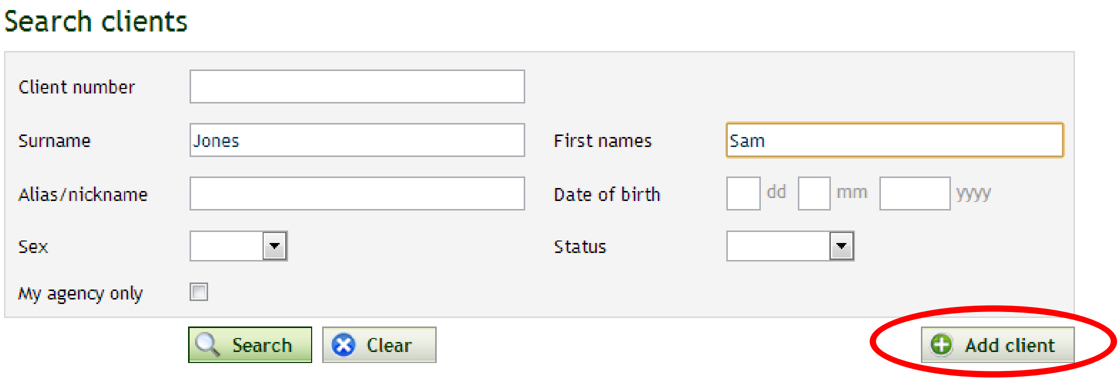
Adding a new client

Starting to add a client

If a thorough search has not returned any client matches, you will need to create a new client record. When adding a client to H2H you have the option to start the process from three different places within the system. These are:

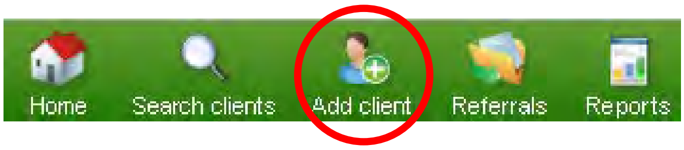
1. Add a client from the Search Screen.

- Select the button on the search clients screen (shown below). After completing a search of H2H to ensure your client is not already on the system, you would click this button to begin adding the new client using information you have already entered in your search



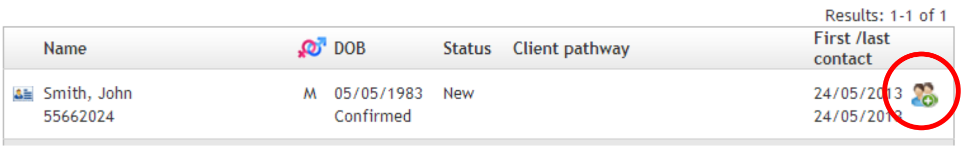
2. Add a client from the main menu

- Select the *Add client* button at the top right of any H2H screen (shown below). This option should only be used if you have already completed a search and are confident that the client is not already on H2H



3. Add a client based on another clients record

- Search for the exisiting client that you want to base your new client on, and locate the icon on the search results page (shown below). This icon allows you to add a new client based on an existing clients record. The existing clients cultural identity, contact information and housing history is automatically transferred to the new client, saving users time completing this information for the new client



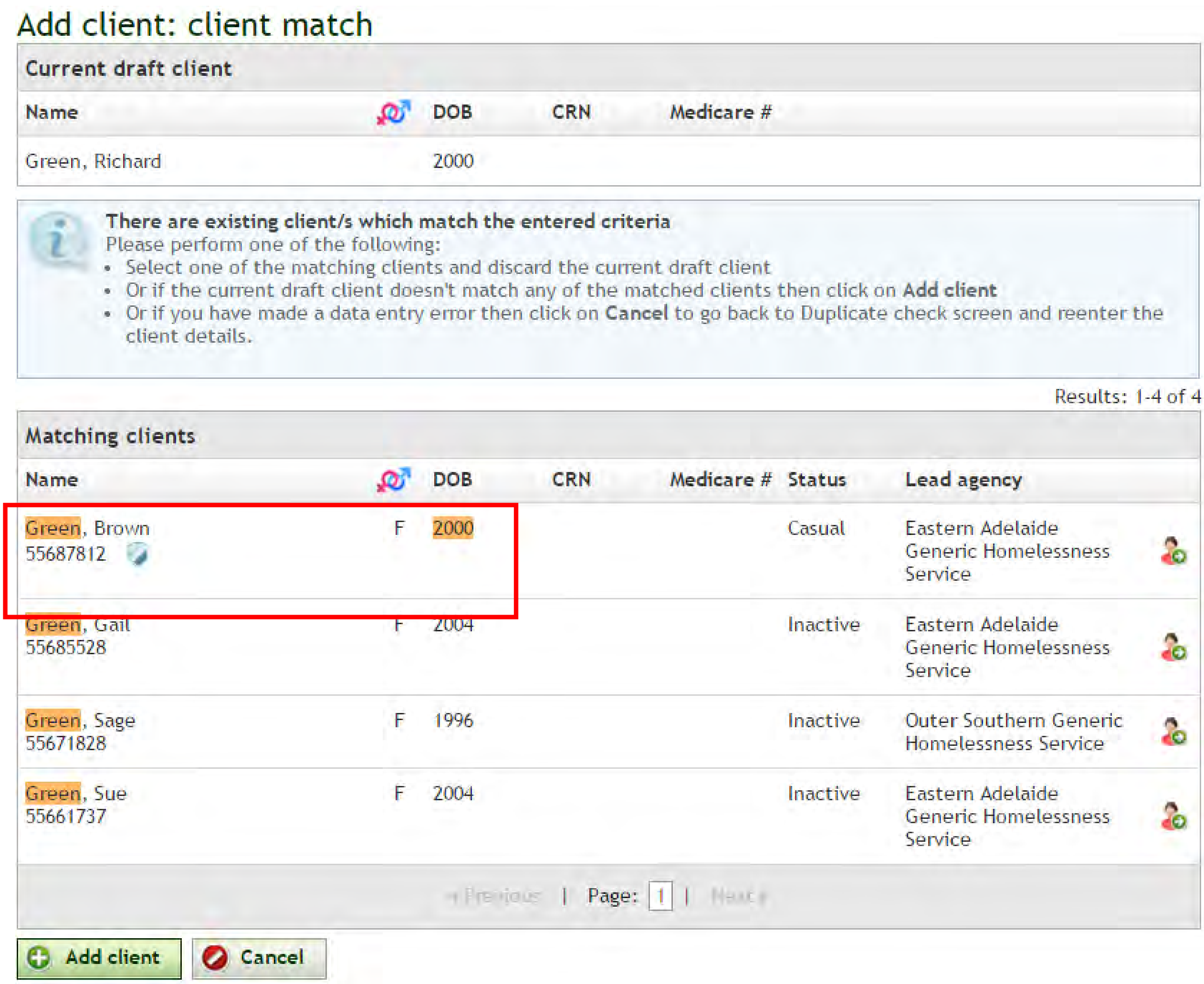
Duplicate Checks

The add client process has several built-in duplicate checks. A duplicate check involves the system highlighting any potential matches to the new client, based on;

- Name
- Sex
- date of birth
- Centrelink and Medicare details (if available)

For example, below you can see a screenshot where draft client Richard Green, has returned several potential matches.

The first match has identified that the surname and year of birth match for the draft client and the existing listed client.

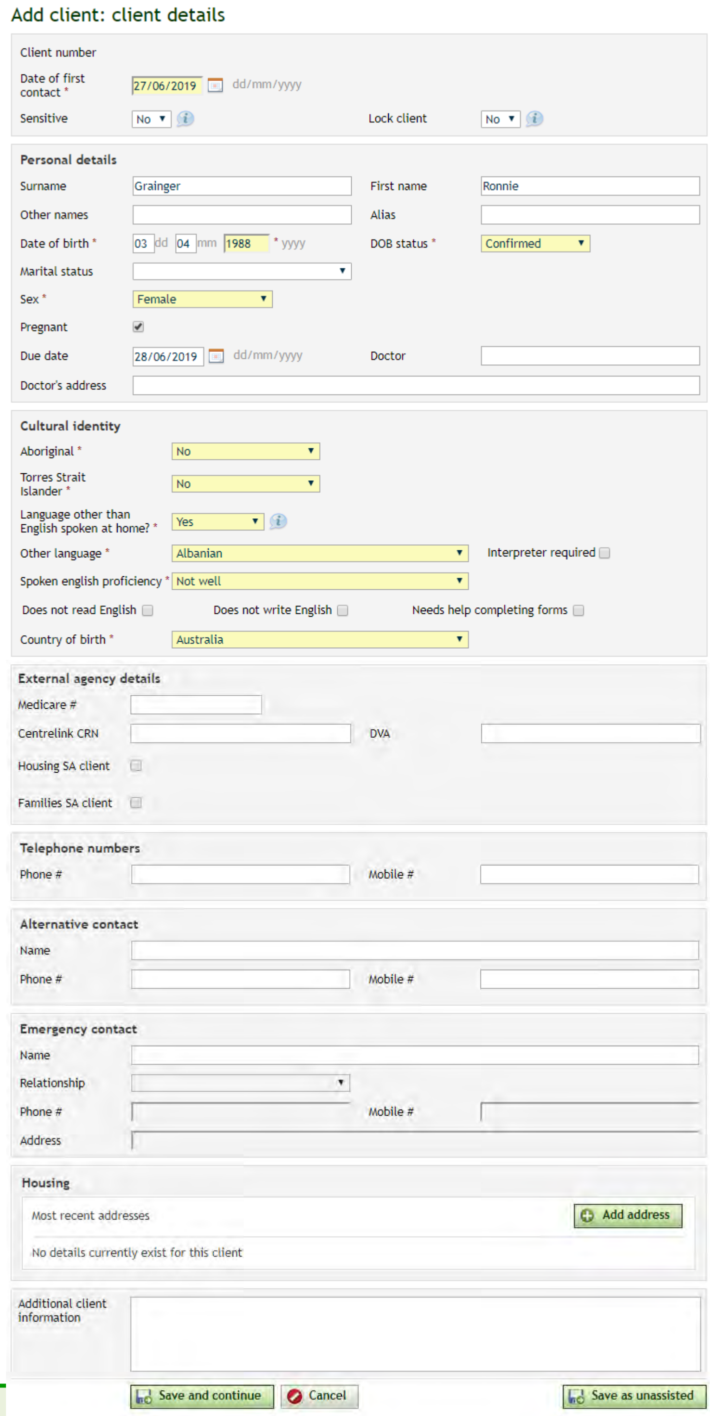


If you determine that an existing record is a match for the client being entered, you can select the icon to discard your draft client, and use the selected client. If none of the listed clients match your draft client, select the 'Add client' button at the bottom of the page to proceed.

Add client page

The *add client: client details* page captures all the information needed to add a new client to the H2H system. Yellow fields are mandatory and must be completed before you can proceed.

On this page you also have the ability to set your client record to [sensitive or locked]() (Function only available to users with agency manager level access).



Client **personal details** are captured here. Pregnancy fields will only appear for client record with sex selected as 'female' or 'other'

Client **cultural identity** details are captured here

Any **external agencies** that your client may be involved with are recorded here

Client **contact** details are recorded here

Emergency contact details are recorded here

Clients **housing history** is recorded here

Note: additional addresses can be added at the intake stage

***Please note**:*

All information entered into the client details screen can be edited by the lead agency at any stage in the client pathway. See the personal details section for more information

Housing panel

The housing panel is used to record your client's addresses, both current and historical. All addresses that are entered here are saved onto the client record and are carried though to intake. To enter an address for a client you must record at minimum;

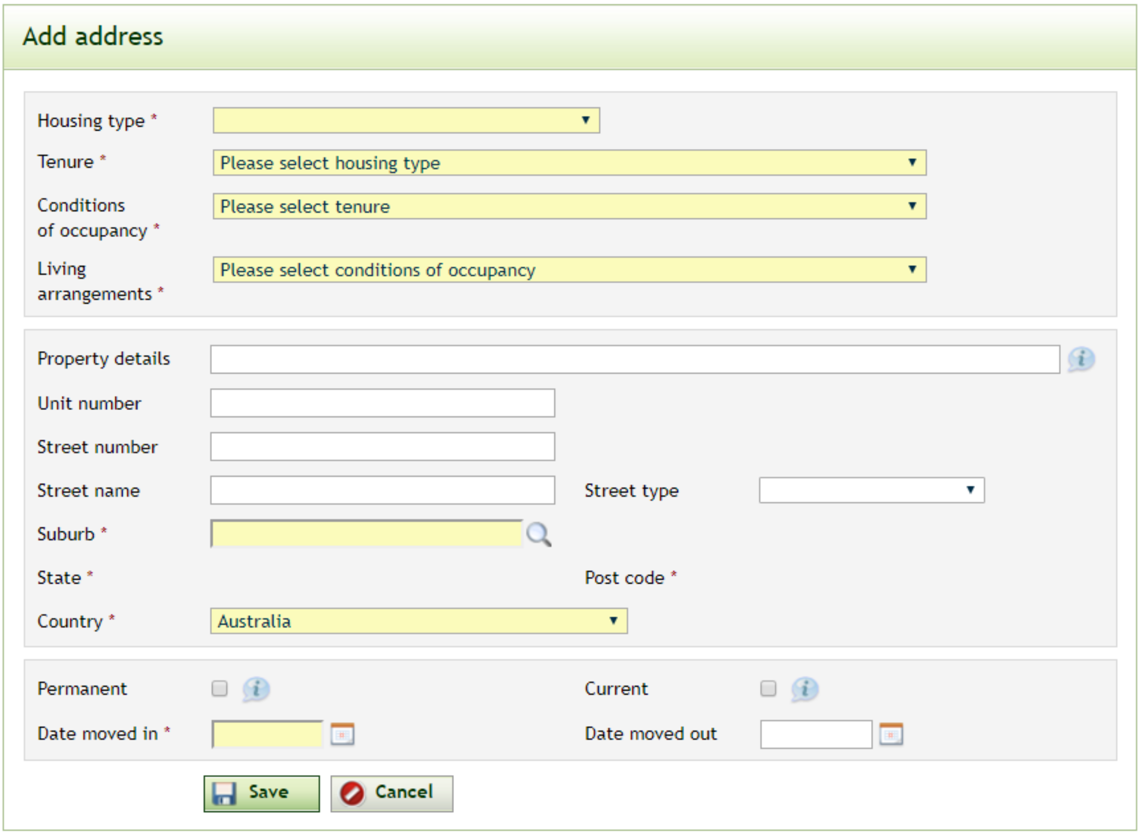
- House type
- Tenure
- Occupancy Condition
- Living arrangement
- Suburb
- Country
- Date moved in

There is no limit to the number of addresses that can be recorded in this panel.

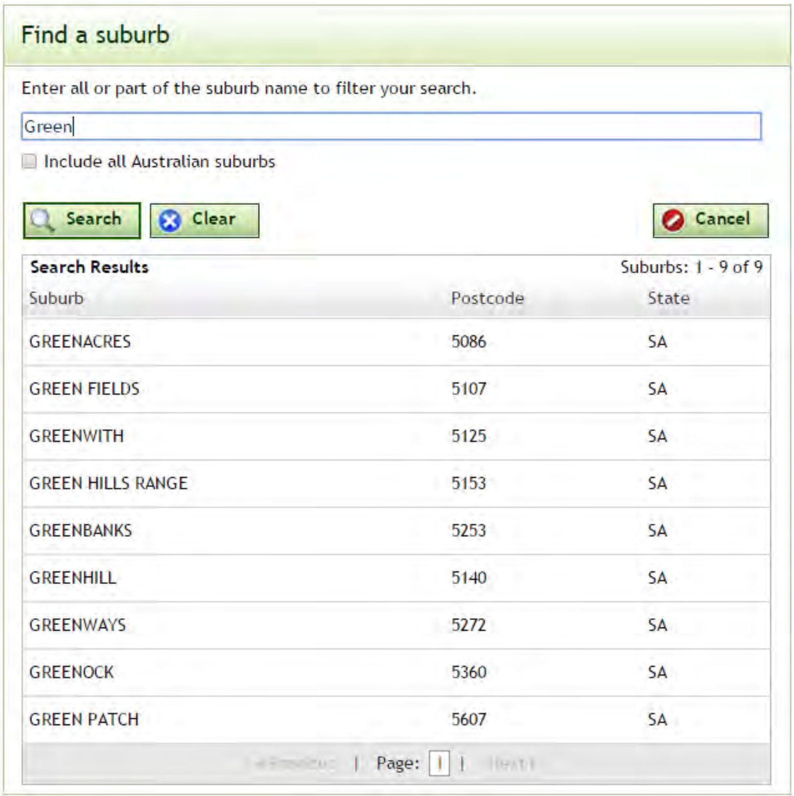
It is not mandatory to enter client addresses at this stage; address details can also be added during the intake process if needed.

To add an address within the housing panel, click the 

button. The following popup will appear:

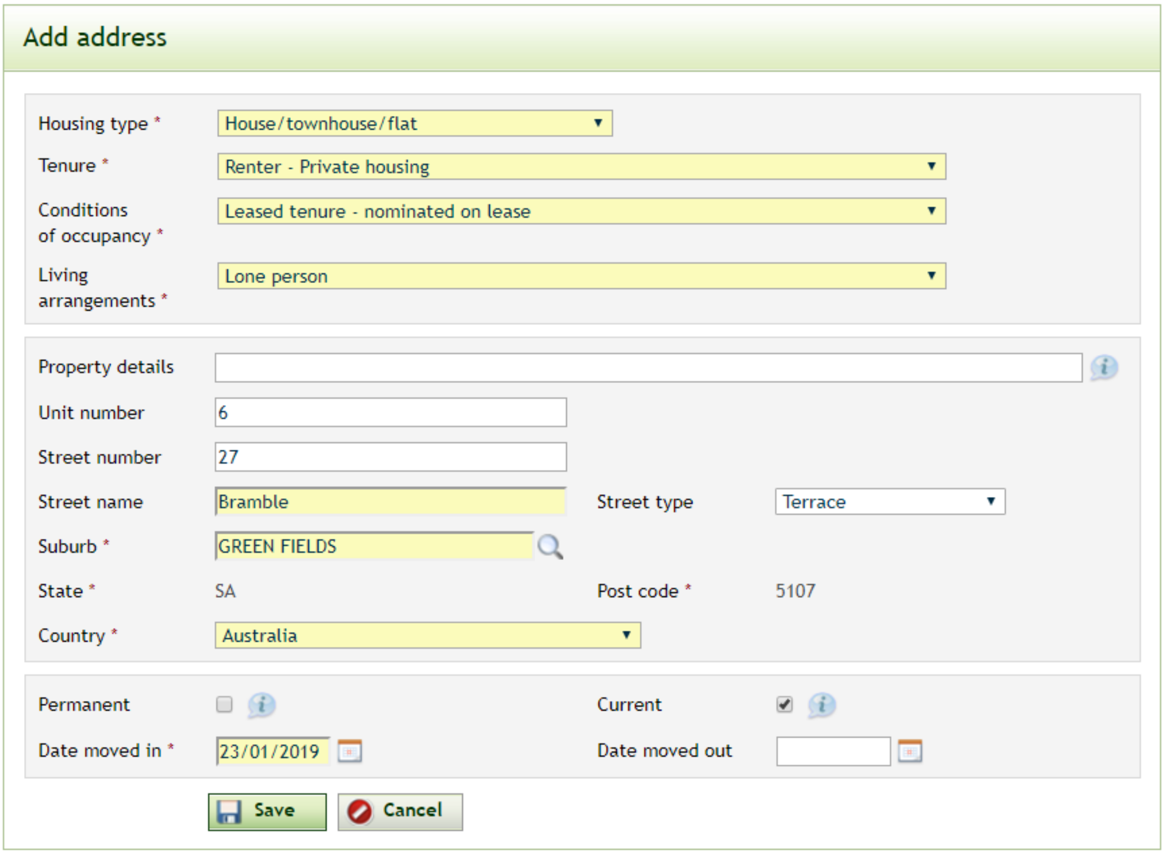


Selecting the icon will bring up the ‘Find a suburb’ tool, where you can search for all or part of a suburb name, or select the checkbox to search all Australian suburbs. For example, a search for suburbs containing the word ‘Green’ would appear as follows;

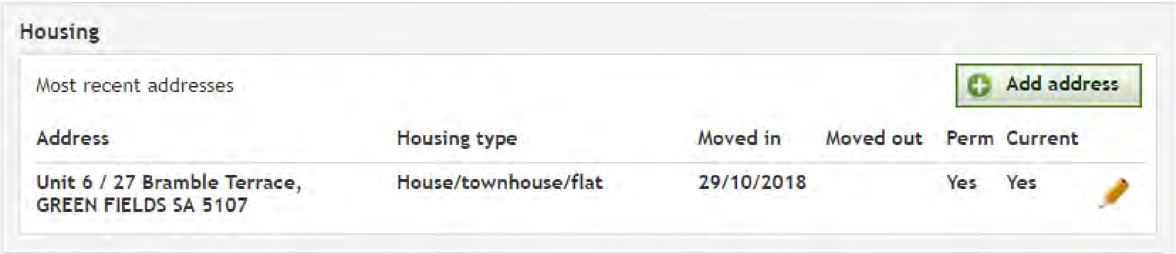


You can select the correct suburb with a single click anywhere on the search result line.

Once selected the suburb name, state and post code will be entered into the address, as seen below;



For each address you can also indicate whether this address was a permanent address (*Tenure in a conventional dwelling for at least 3 months*), and/or the current address (*select to indicate if this is the client's current living situation*). Once all mandatory fields have been completed the address can be saved. The address will then appear in the housing panel.



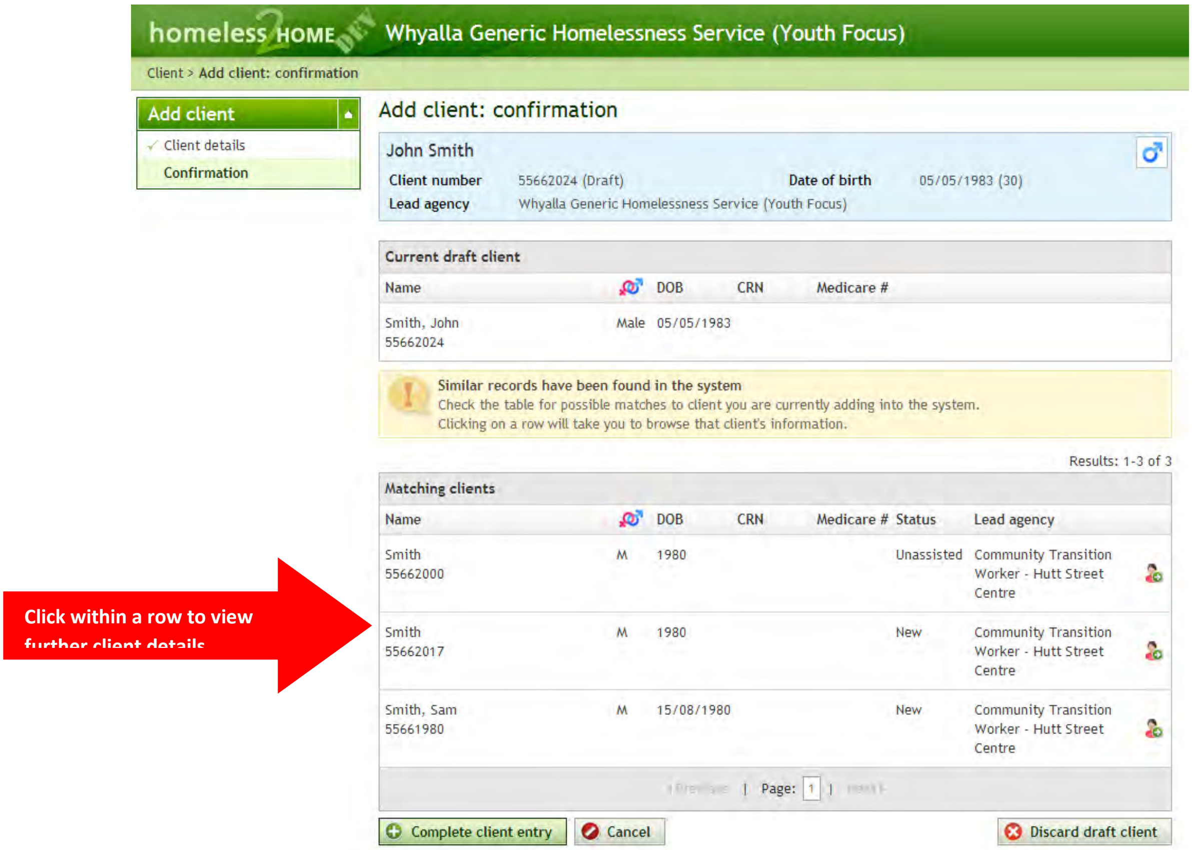
Completing the client entry

After completing all the mandatory (yellow) fields on the page you have the option to save and continue or save as unassisted at the bottom of the page

- The *save and continue* button will take you to the confirmation page where you will finalise adding the client record.
- The *Save as unassisted* button allows you to set your client status to *unassisted*. Go to the *unassisted history section* for more information.

Add Client: Confirmation page

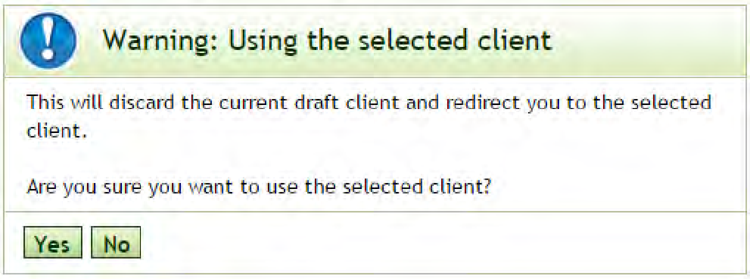
The confirmation page is the final step in the *add client* process. If there are any possible client matches to the client you are currently adding, they will be listed here, as the system completes one final duplicate check. In the example below, you can see there are 3 potential matches;



If none of the listed client records match the client you are adding, click the *complete client entry* button to finalise the *add client* process. This will change the client status to *new* and you will be directed to the *add intake* page.

The *cancel* button will take you back to the previous page, and the *discard draft client* button will delete all the information you have added so far and remove the draft from the system completely.

The *use selected client* button allows you to select that client record for use, and discard the current client record you are adding. You will notice the *use selected client* button at the end of each matching client row listed. Selecting this icon will bring up the following pop up;

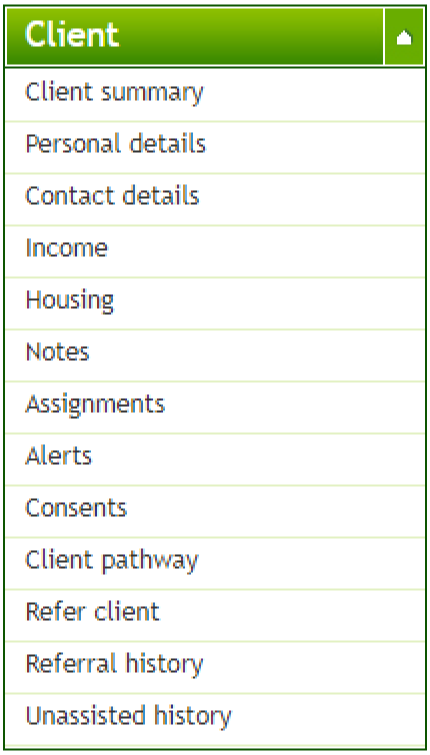


- Selecting yes will discard the draft client and redirect to the selected client
- Selecting no will return you to the confirmation page

Clicking within any rows in the matching clients table will take you to that client's summary page, and the current record you are adding will be saved as *draft*.

The Client Menu

The client menu

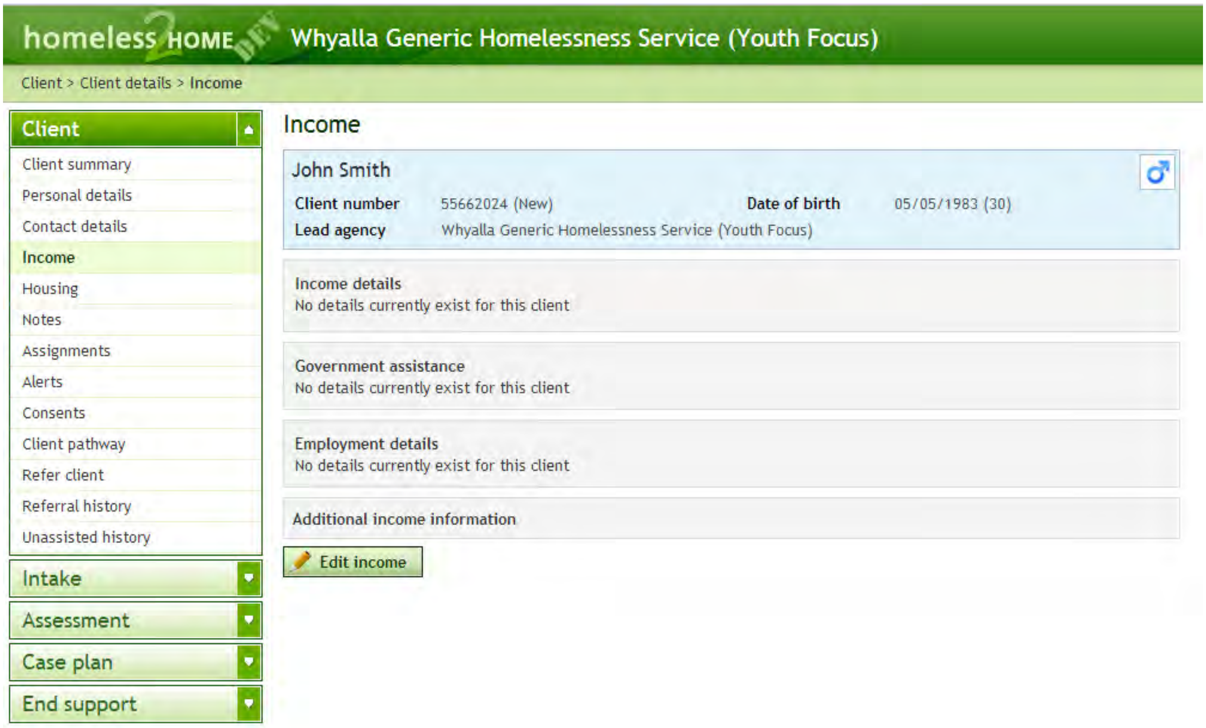


Once a client is added to H2H, the client menu expands (as shown right) to include all pages that are captured within the client record.

Where no information has been recorded on a page then the message 'no details currently exist for this client' will be displayed. Each page will contain this message unless:

- The information has already been added as part of the *add client* process (such as housing information).
- An Intake, Case exit or End support is completed (details entered on these functions save back to the client pages); or
- Information is added to these pages directly.

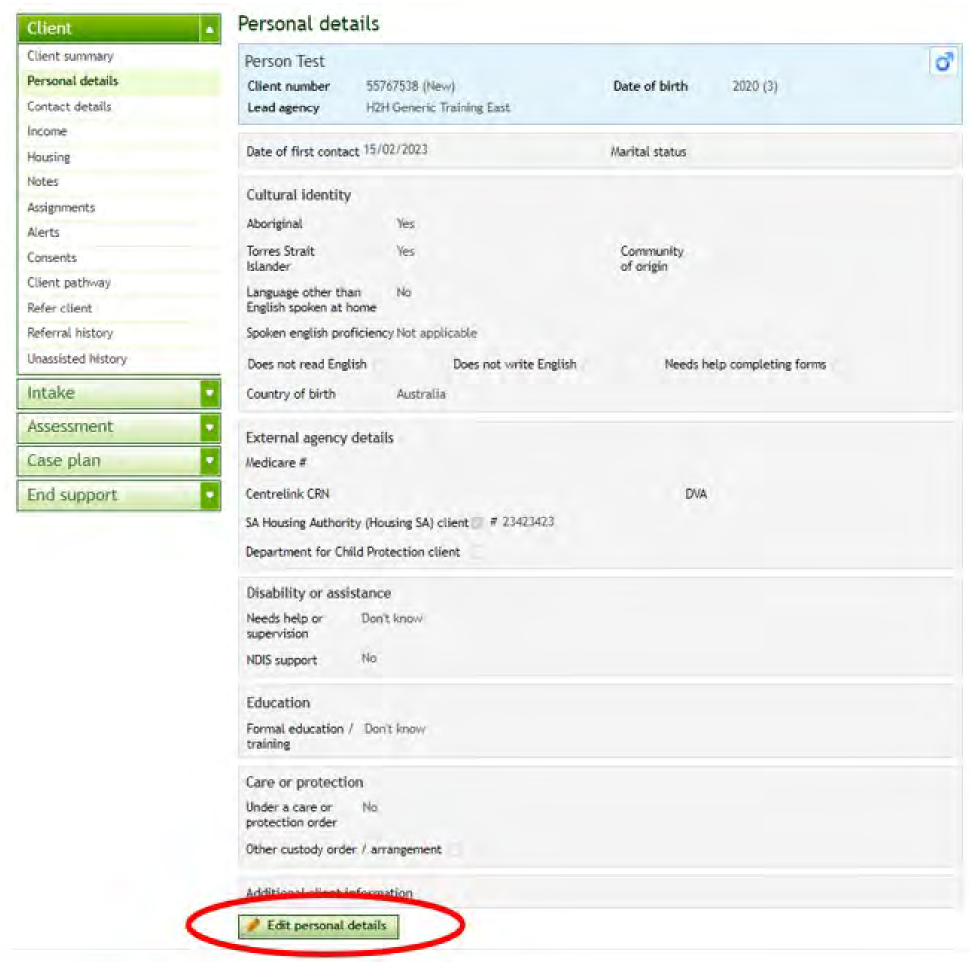
> ***Please note**:*
>
> *If you will be proceeding to intake you do not need to enter information manually into the client menu screens. It will be collected during the intake process*



The personal details, contact details, income, housing and risk assessment screens will all display the most current information for the client.

Editing personal details

All of the information in the client menu pages can be edited using the 'edit' button that appears at the bottom of each screen.

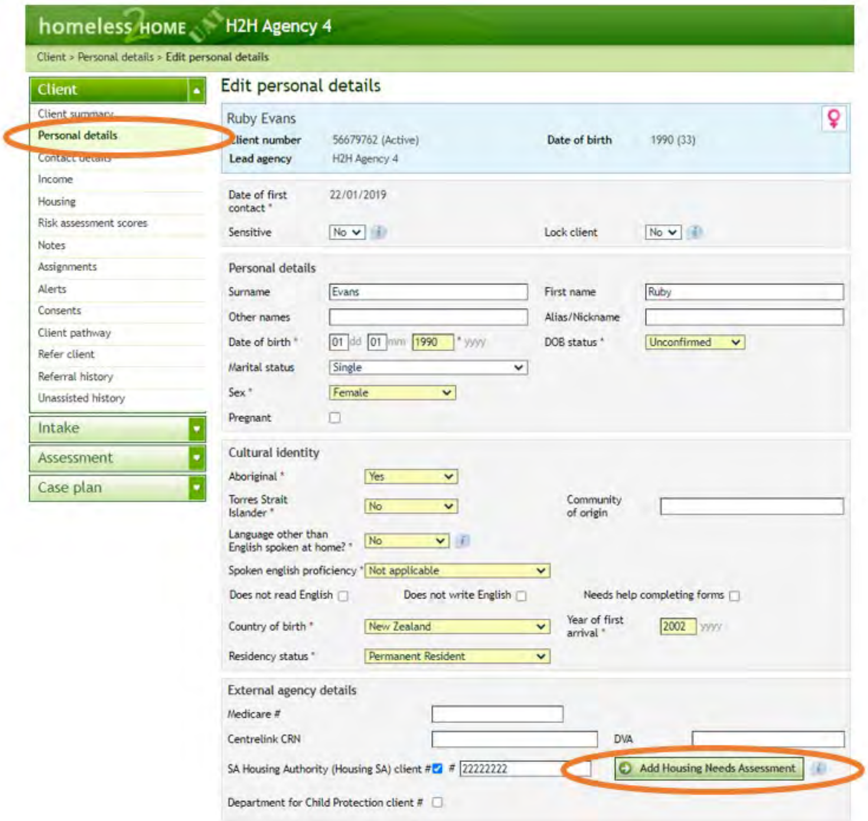


Once in edit mode, most fields can be updated as needed. Regular updates are important to ensure accuracy of client information.

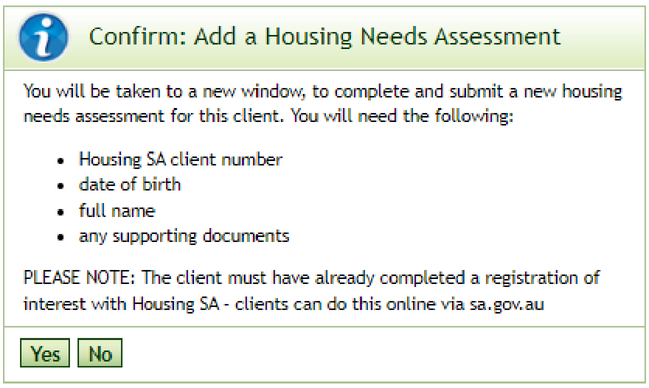
Completing an Agency Housing Needs Assessment

An online version of the SA Housing Authority Housing Needs Assessment (HNA) is available via a link in the Homeless2Home (H2H) system, located on the edit personal details screen as shown below.

This alternate option to completing the existing Agency HNA, allows for the entire HNA process to be completed online, including submission of supporting documents, and involves the verification of both client and agency/worker information via H2H, to allow for client matching and identification of the support provider



Key points to consider when choosing this HNA option for your client are:



- Has your client consented to the sharing of information with the SA Housing Authority? This should be recorded as per your agencies existing consent procedures
- Do you have all the required client details in H2H? To match the client from H2H to the Authority's Housing Connect system you must have:
    - Housing SA client/customer number
    - Date of birth (DD/MM/YYYY)
    - Full name (First and Surname)
- Does the client have an existing Registration of Interest with the SA Housing Authority? This must have been completed, and income and identification verified prior to the HNA.
- Do you have all support documents ready to upload? There is no ability to SAVE progress on a HNA or add documents after submission
- Are the documents for upload correct? You will be unable to delete incorrect documents. You must upload the correct documents as well as any mistaken ones or begin the assessment again.

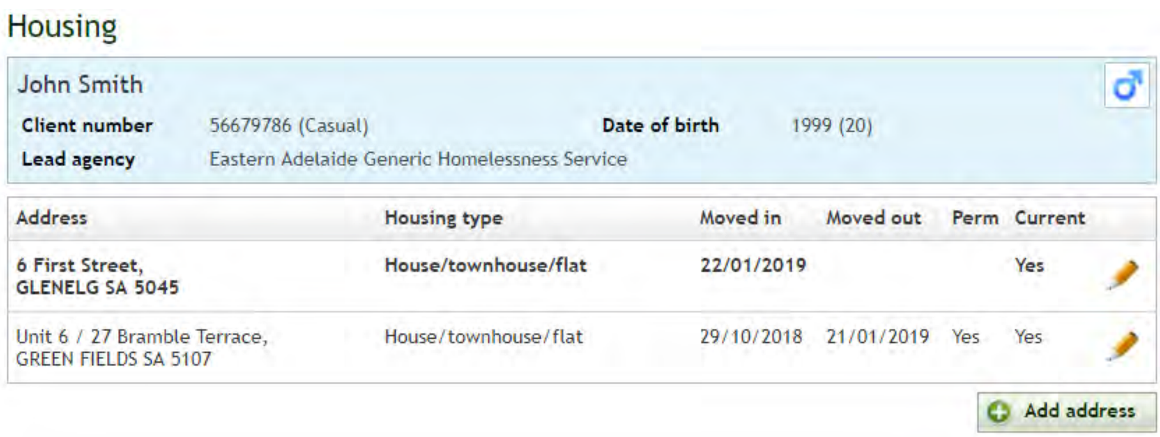
- Do you have clarity around the client's circumstance and answers to the questions the in the HNA? Once the HNA is submitted the Category outcome will be based on what is included with no follow up. Text fields will allow for up to 1000 characters
    - You can find further information about the information and evidence required at [sa.gov.au](sa.gov.au)
    - Once submitted, the HNA is directed to an Access worker at the SA Housing Authority for review, and the client/customer will be advised of the outcome via their preferred contact method.

> ***Please note****:*
>
> *Like H2H, the online HNA has a 15-minute timeout to protect the privacy of client information, which will reset as you progress to the next page in the HNA. Be mindful of time taken to type responses on each page, as your progress will not be saved if you are timed out*

Housing

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 (current checkbox selected, and no moved out date) will be displayed at the top of this list in **bold** type. You can only have one open current address at a time.

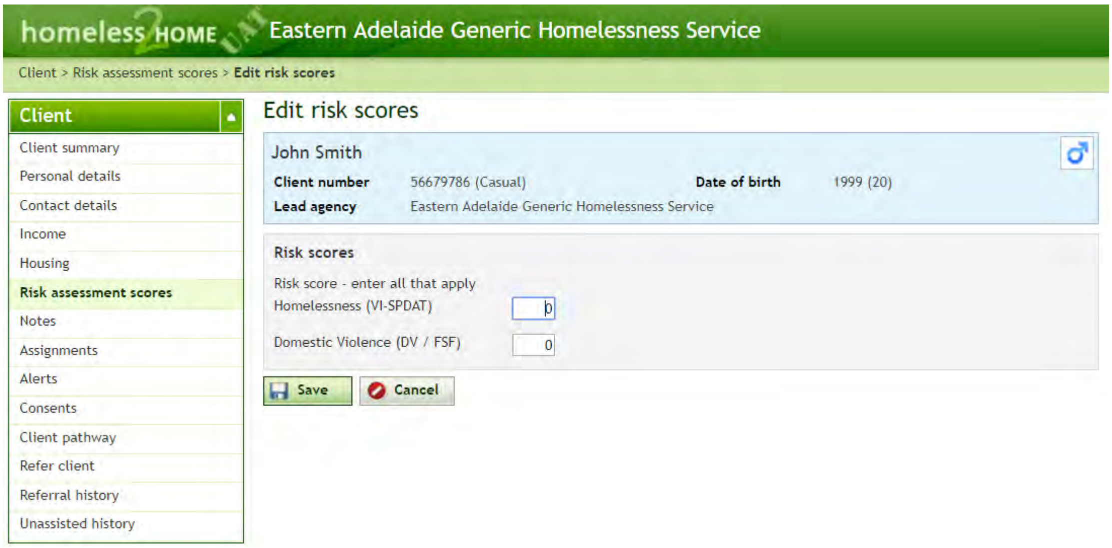


To update the client housing situation, you will need to close the most recent current address by adding a moved-out date, before you add the new address.

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.

Risk Assessment Scores

Users can record a risk assessment score for either Homelessness or Domestic Violence by selecting the 'edit score' button, and entering a number between 0-999



The most recent score will be displayed if scores exist. Risk assessment scores can also be entered in the relevant issues within assessment and case plan.

Notes

The notes screen in the client menu displays all notes entered on the client record, and includes a button to add a new note, or to search existing notes.

- All notes in H2H will be date, time and author stamped once saved.
- Notes cannot be deleted from H2H once entered.
- All notes are displayed in reverse chronological order, with the most recent notes at the top of the list.

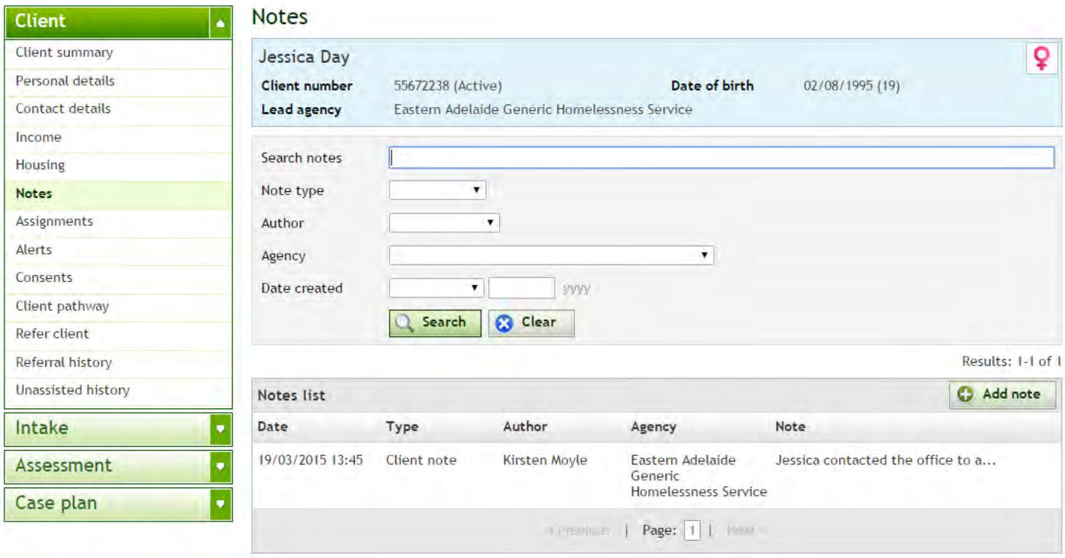
Please note*:*

Notes are not a mandatory function in H2H. It is up to the discretion of the individual agency to decide if they will use the notes function on H2H or record notes elsewhere.

Notes can also be searched by the following;

- Text (words or phrases that are contained with a note)
- Note type
- Author
- Agency

- Month or year created



There are three types of notes in the H2H System, client, case and service notes.

1. Client Notes:

These notes travel with the client record, and are visible by the current lead agency, and any agency with a current consent. They are attached to the client record as a whole. Client notes can be added by either a lead or consented agency.

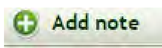
2. Case Notes:

These notes are part of the case plan and can only be added if a case plan exists for the client. They can only be viewed by the lead agency that created the case plan and cannot be viewed by any other agency on H2H at any stage. Setting consent to another agency will not give them access to view case notes. If the client is picked up by another lead agency in the future, and another case plan is opened, the new agency will not be able to access notes from any other agency's case plan. Historical case notes can be accessed through the client pathway.

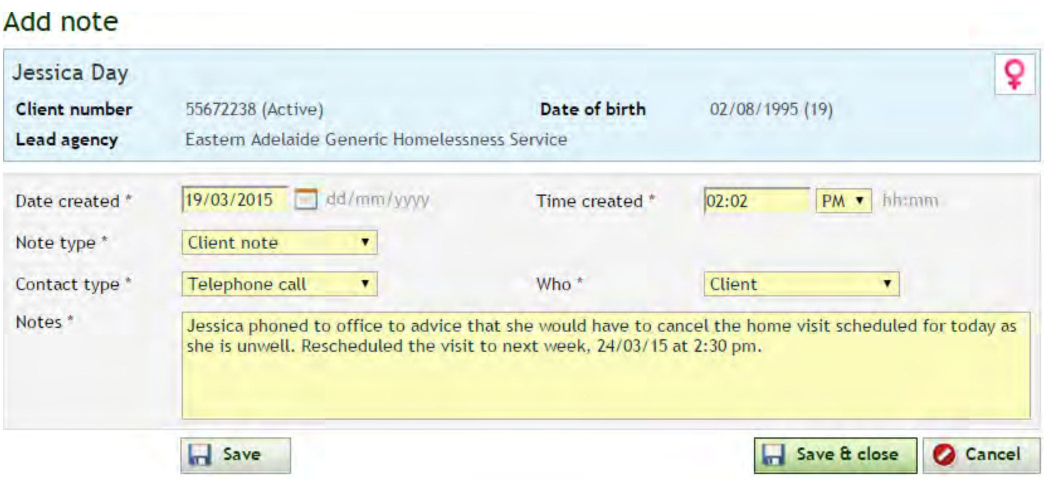
3. Service notes:

service notes are also part of the case plan, but are more specific than a case note, being attached to a particular service within the case plan. Similar service notes can only be viewed by the lead agency or where a consented agency has been referred an individual service, they will be able to add a service note once the referral has been accepted, and both the lead and consented agency will be able to view this. The consented agency will not be able to view any notes related to other services in the case plan.

Adding a note

All 3 types of notes can be added from the notes screen in the client menu. Select the 

button to add a new note, and the add note screen will open;



When adding a note, the date and time will be automatically prefilled, however these can be backdated if required.

A contact type (e.g. phone call, meeting, SMS etc.), and person (e.g. client, 3rd party, etc) must be selected.

Notes can be entered either by directly typing, or by copy pasting using keyboard shortcuts to a maximum of 8000 characters.

- To complete the note, select the *save & close* button
- To save the note as it is and continue typing (to avoid the 20-minute timeout) select the *save* button. This will reset the 20-minute timer, and you can continue typing.
- To cancel the note without saving, select the *cancel* button.

> ***Note:***
>
> *Once a note has been saved & closed, it cannot be edited or deleted*

Case and service notes can also be added from the case plan menu. For further information see the Case/service notes section.

Assignments

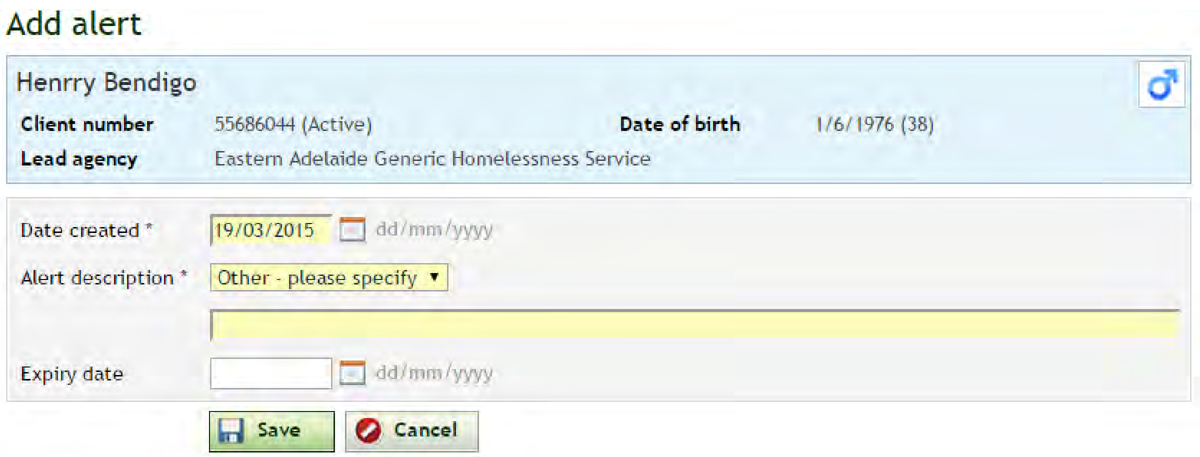
This screen is visible only to those users with Agency Manager level of access. See the agency manager functions section for instruction on use of this function.

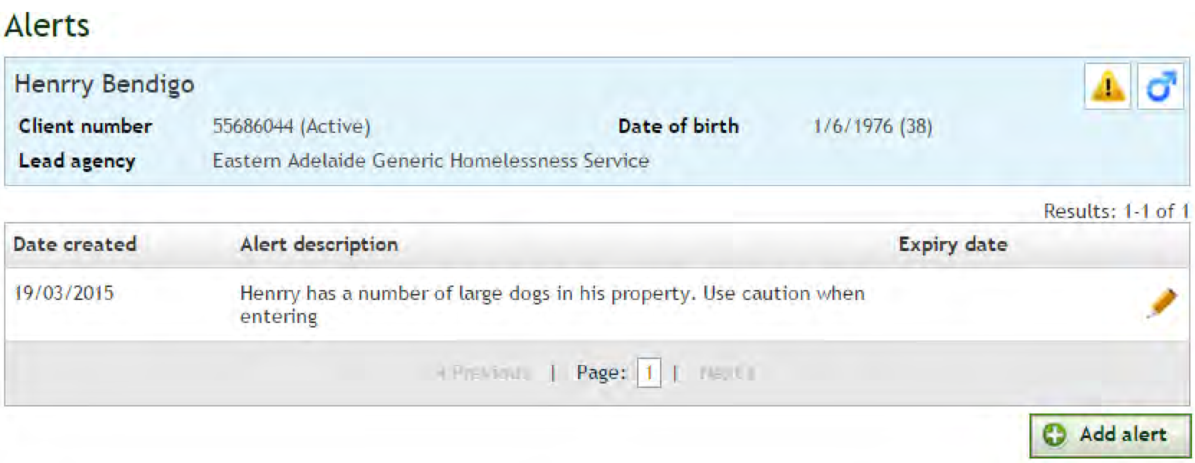
Alerts

The purpose of an alert is to flag any health, safety and/or service issues that are essential for workers to be aware of before working with a client. It is important to understand that:

- The placement of alerts on a client's record should be where there is a clear health, safety or service issue that is essential for staff to know before working with a client.
- Alerts can be placed on a client's record for both worker benefit (e.g. "client refuses to work with female staff") or the client's benefit ("client cannot read, do not send written information").
- Alerts are visible to all users on H2H, except where the client record has been set to sensitive or locked.

To add an alert, go to the alert's menu, and select the *add alert* button, and then enter the alert information and save, as seen below.





Alerts

Henrry Bendigo

Client number	55686044 (Active)	**Date of birth**	1/6/1976 (38)
Lead agency	Eastern Adelaide Generic Homelessness Service		

Results: 1-1 of 1

Date created	Alert description	Expiry date
19/03/2015	Henrry has a number of large dogs in his property. Use caution when entering	

« Previous | Page: 1 | Next »

Add alert

There is no limit to the number of alerts that can be added. Alert text and dates can be edited by selecting the edit pencil icon.

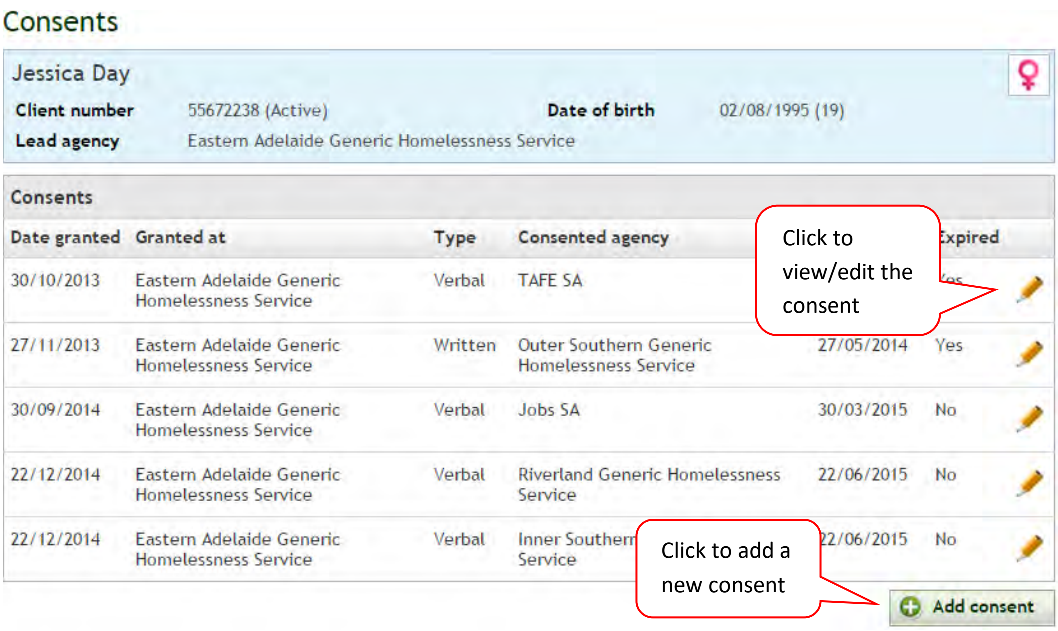
Consents

Setting consent to another SHS that uses H2H will allow that agency to view client information in the client, services and assessment menus. It will not allow that agency to view a case plan for that client.

You can find a list of all current or historical consents for information sharing between agencies, and a button for adding a new consent on the consent screen. From this screen, existing consents can also be edited by the lead agency that created them to extend the expiry date if required.

There are two types of consents in H2H.

- An Internal (within NAHA) consent: consenting to share information with another specialist homelessness service that uses H2H
- An external consent: a consent that allows the user to type in the consent manually for an agency that does not use H2H.



Consents

Jessica Day

Client number	55672238 (Active)	**Date of birth**	02/08/1995 (19)
Lead agency	Eastern Adelaide Generic Homelessness Service		

Consents

Date granted	Granted at	Type	Consented agency	Expiry date	Expired
30/10/2013	Eastern Adelaide Generic Homelessness Service	Verbal	TAFE SA		Yes
27/11/2013	Eastern Adelaide Generic Homelessness Service	Written	Outer Southern Generic Homelessness Service	27/05/2014	Yes
30/09/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Jobs SA	30/03/2015	No
22/12/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Riverland Generic Homelessness Service	22/06/2015	No
22/12/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Inner Southern Service	22/06/2015	No

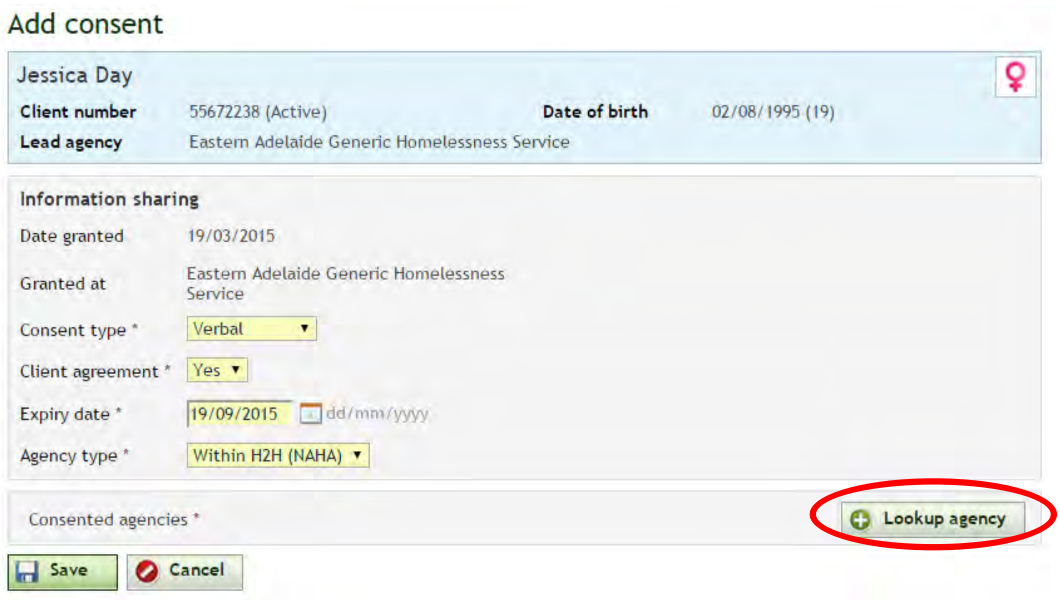
Add consent

> ***Note**:*
>
> *Prior to sharing information with other agencies via a consent, users should ensure that the client has granted verbal or written permission, or that they are covered by the Information Sharing Guidelines*

Adding a new consent

Select the *add consent* button to add a new consent

To share information with another SHS, select 'Within H2H (NAHA)' as the Agency Type; then select the *lookup agency* button;


Add consent

Jessica Day

Client number 55672238 (Active)

Date of birth 02/08/1995 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

Information sharing

Date granted 19/03/2015

Granted at Eastern Adelaide Generic Homelessness Service

Consent type * Verbal

Client agreement * Yes

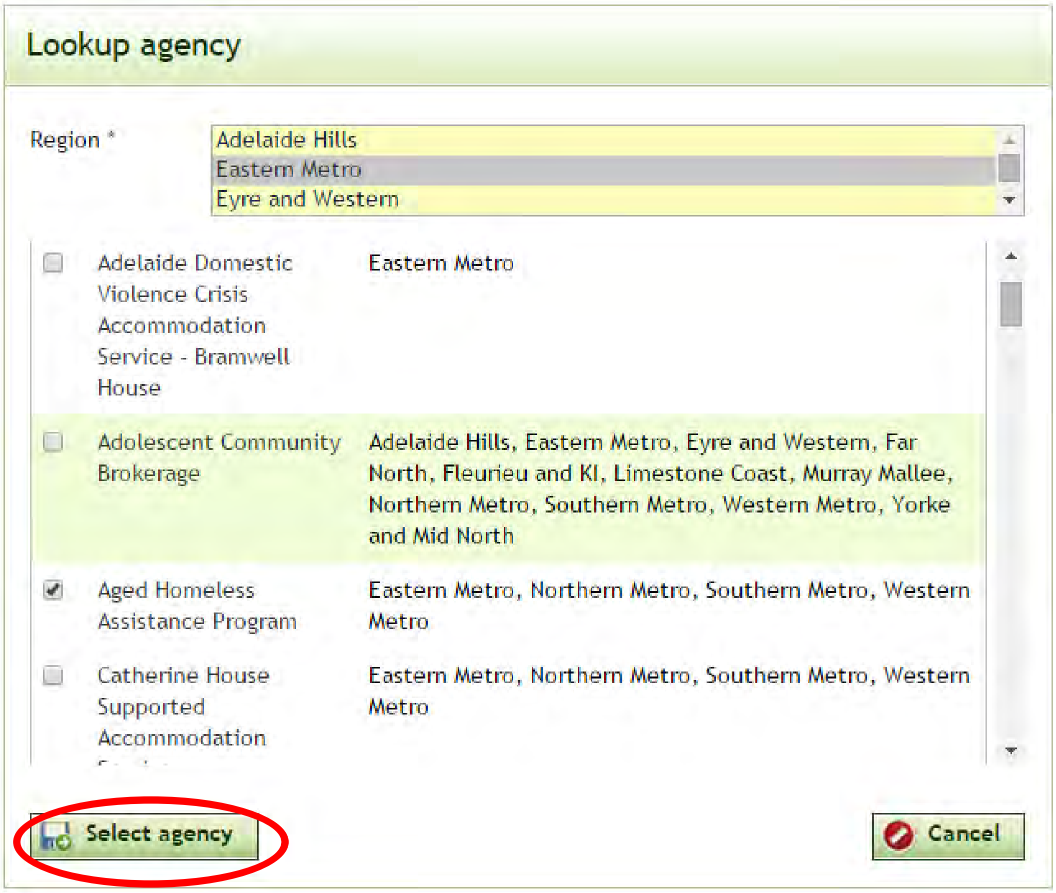
Expiry date * 19/09/2015 dd/mm/yyyy

Agency type * Within H2H (NAHA)

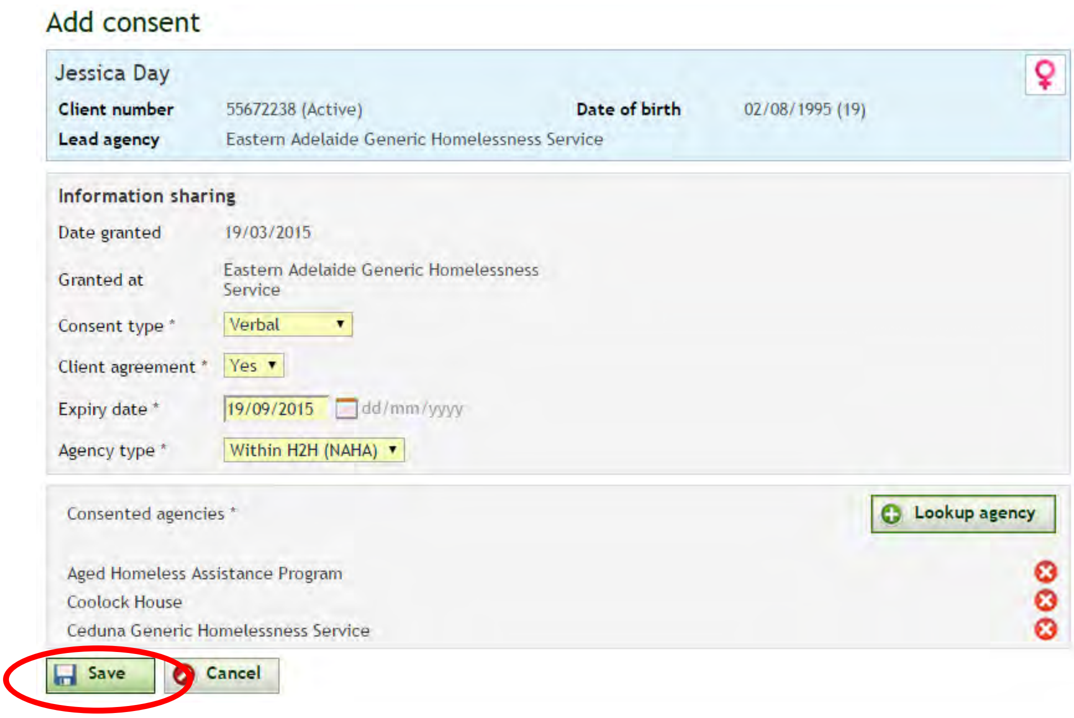
Consented agencies * Lookup agency

Save Cancel

Then select the region, and the agency(s) within the region that the client has consented to share information with. You may select any number of agencies using this method, however you can only select from one region at a time.



Once the required agency(s) have been selected, click the *select agency* button (shown above) to return to the consent screen and save the consent.



Selecting the *save* button will return you to the consents screen, where you can view the consents that have now been added to the list.

Consents can also be added as part of the process of referring a service, or when referring a client to another agency.

Setting consent on a child's record

When adding a consent to a child's record, you will be asked two additional questions.

- Who granted consent? (e.g. Guardian, Child Protection Agency, other)
- Name of that person

The below chart sets out what is visible based on the setting of consent, by where you are in the client pathway.

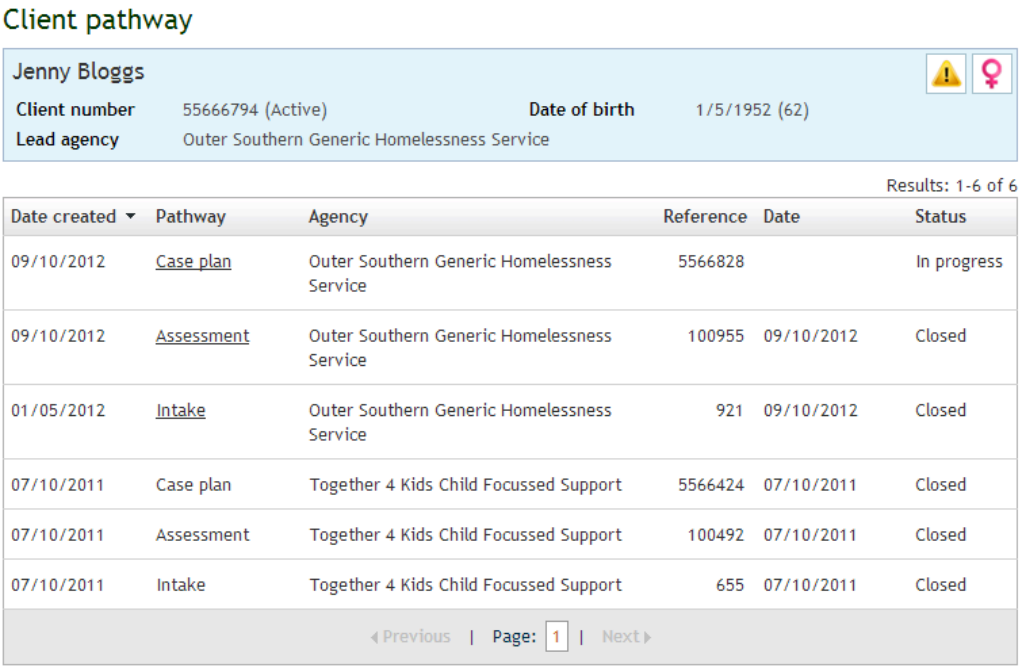
Consent and Information Sharing in H2H – Lead and Consented Agencies	Lead Agency	Consented Agency Manager	Consented Agency other user roles	Non-Consented Agency
Client Menu				
Client Summary	✓	✓	✓	✓
Personal Details	✓	✓	✓	
Contact Details	✓	✓	✓	
Income	✓	✓	✓	
Housing	✓	✓	✓	
Risk assessment scores	✓	✓	✓	
Client notes – view	✓	✓	✓	
Client notes – add	✓	✓	✓	
Assignments	✓			
Alerts	✓	✓	✓	✓
Consents	✓	✓	✓	✓
Client pathway	✓	✓	✓	✓
Refer Client	✓			
Referral History	✓			
Unassisted History	✓	✓	✓	✓
INTAKE				
view completed intake	✓	✓	✓	
Services – view	✓	✓	✓	
Services – add provided	✓	✓	✓	
Services – add referred, unmet need	✓			
Presenting Unit view	✓	✓	✓	✓
ASSESSMENT				
View completed Assessment	✓	✓	✓	
CASE PLAN				
Cover page – view	✓	✓*	✓**	
Case notes – view	✓			
Case notes – add	✓			
Service notes – view	✓	✓*	✓**	
Service notes – add	✓	✓*	✓**	
Life domains – view	✓	✓*	✓**	
Issues – view	✓	✓*	✓**	
Issues – add/edit/close	✓			
Services – (provided) add, edit, close	✓	✓*	✓**	
Services – (referred or unmet need) add, edit, close	✓			

* The ability to view/edit this information is based on an existing service referral having been sent and accepted

** The ability to view/edit this information is based on worker assignment and access level

The Client Pathway

Each client created in H2H starts a client pathway. The client pathway is a record of when and where a client has accessed a specialist homelessness service. An example of a client pathway is shown below.


Client pathway

Jenny Bloggs

Client number 55666794 (Active) Date of birth 1/5/1952 (62)

Lead agency Outer Southern Generic Homelessness Service

Results: 1-6 of 6

Date created	Pathway	Agency	Reference	Date	Status
09/10/2012	Case plan	Outer Southern Generic Homelessness Service	5566828		In progress
09/10/2012	Assessment	Outer Southern Generic Homelessness Service	100955	09/10/2012	Closed
01/05/2012	Intake	Outer Southern Generic Homelessness Service	921	09/10/2012	Closed
07/10/2011	Case plan	Together 4 Kids Child Focussed Support	5566424	07/10/2011	Closed
07/10/2011	Assessment	Together 4 Kids Child Focussed Support	100492	07/10/2011	Closed
07/10/2011	Intake	Together 4 Kids Child Focussed Support	655	07/10/2011	Closed

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A person should only ever have one client record for the life of their involvement with the South Australian SHS sector. Duplicate client entries interrupt the client pathway and impact recording of a client's journey through the homelessness sector.

Historical information can be accessed from the client pathway. An underlined pathway entry of '<u>intake</u>', '<u>assessment</u>' or '<u>case plan</u>' can be clicked on to view that pathway item, where you can view information that was entered.

Where appropriate consents exist, the following historical information can be viewed for each item[1];

Historical information visible through client pathway	
Intake	View intake information (cover page), and view all services provided or referred including all detail, and copy of pdf referral form for referred services
Assessment	View cover page and assessment details
Case Plan	View cover page, case notes, plan summary, exit information and full case plan issues, issues and services

[1] Some items may be visible only to users with Agency Manager access level

The 'Status' column in the client pathway can also give you information about how the intake, assessment or case plan progressed;

Pathway Item Status Definitions	
In progress	Pathway item (e.g. intake, assessment or case plan) has been created, and is still in progress with the listed agency
Closed Incomplete	An intake was closed while it was in progress, either by an in-progress intake closed by system close **or** adding an 'unassisted' to the record.
Complete	The item was saved and completed (only applicable to intake or assessment)
Closed Complete	The client record was closed off by daemon or end support after the item had been completed (applicable only to intake or assessment)
Closed	The client has moved on to the next pathway item, or a case exit has been completed. (e.g. after saving and completing an intake, the status will be 'complete' if the user then creates an assessment, the intake status will change to 'closed')

Refer client

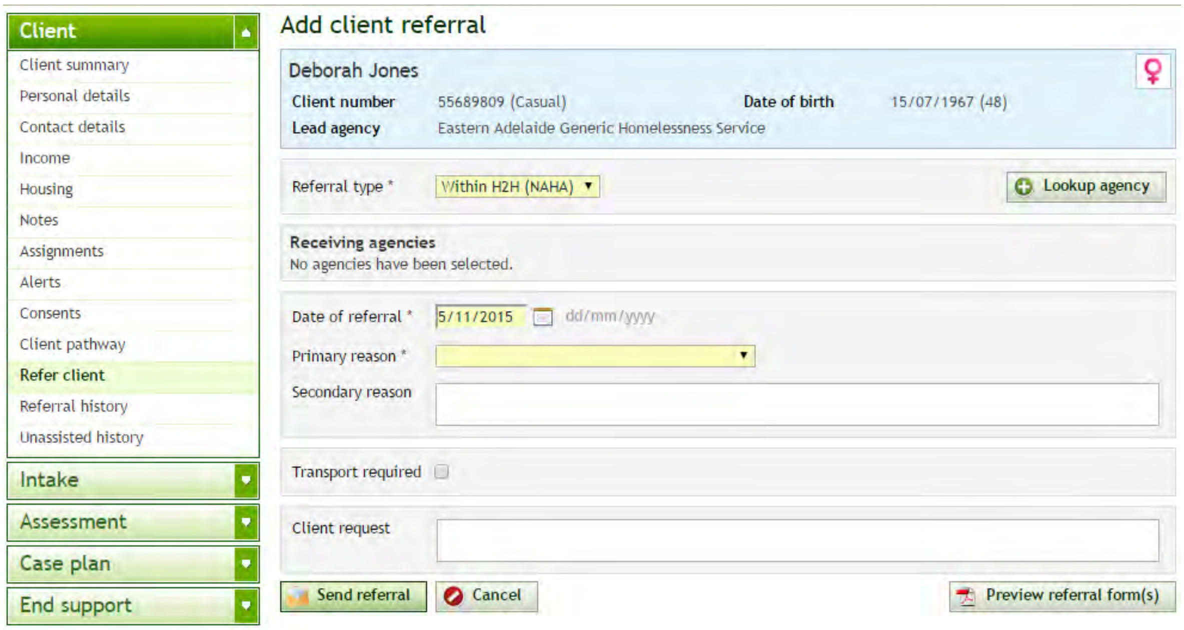
One of the primary functions of H2H is to facilitate the "No wrong door" principle, where a client can present at any SHS in South Australia and be directed to the most appropriate agency for support, according to their individual circumstances. The Refer Client function enables an electronic referral to the appropriate agency, reducing the need for the client to provide their information repeatedly.

> ***Note****:*
>
> *A client record cannot be referred to a new agency unless an intake has been completed. See the intake section for instructions*

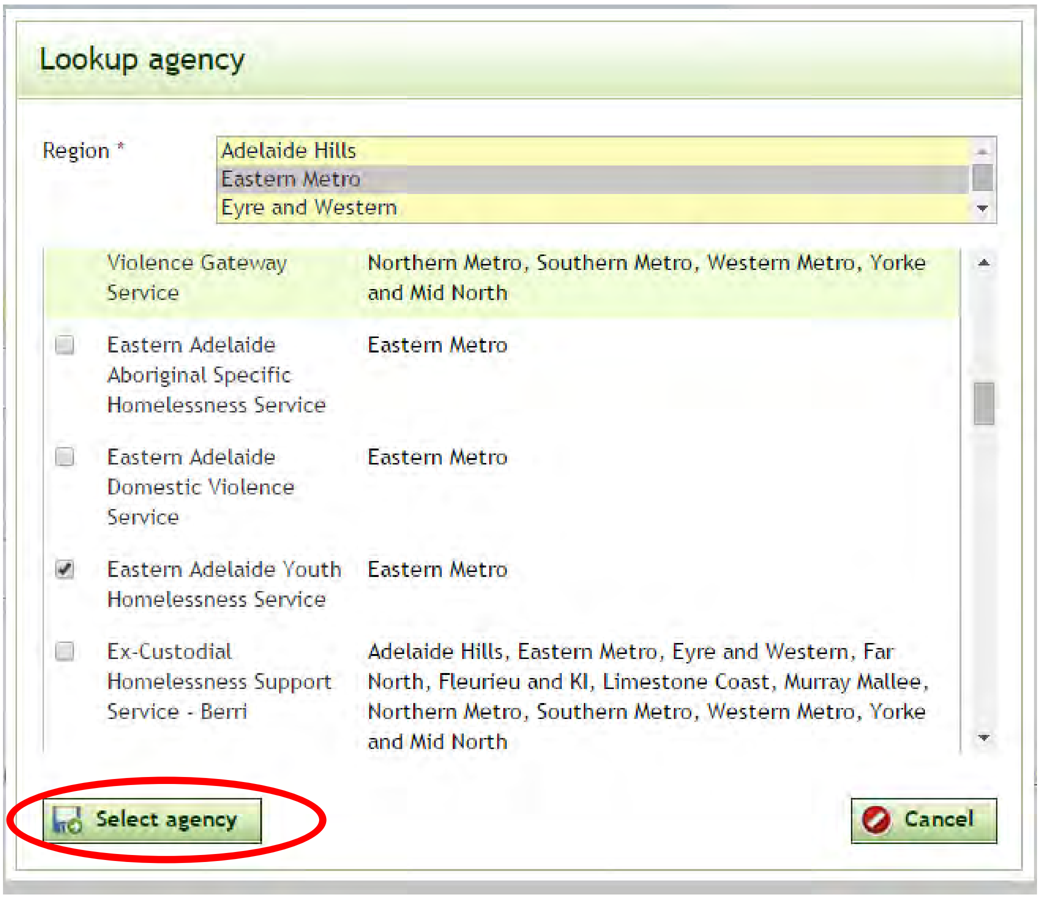
How to refer a client

To refer a whole client record to another specialist homelessness service, follow the steps as outlined below;

Open the client menu and select the 'Refer client' menu. A client must have a status of either 'Casual' or 'Assessed' to be referred to another lead agency



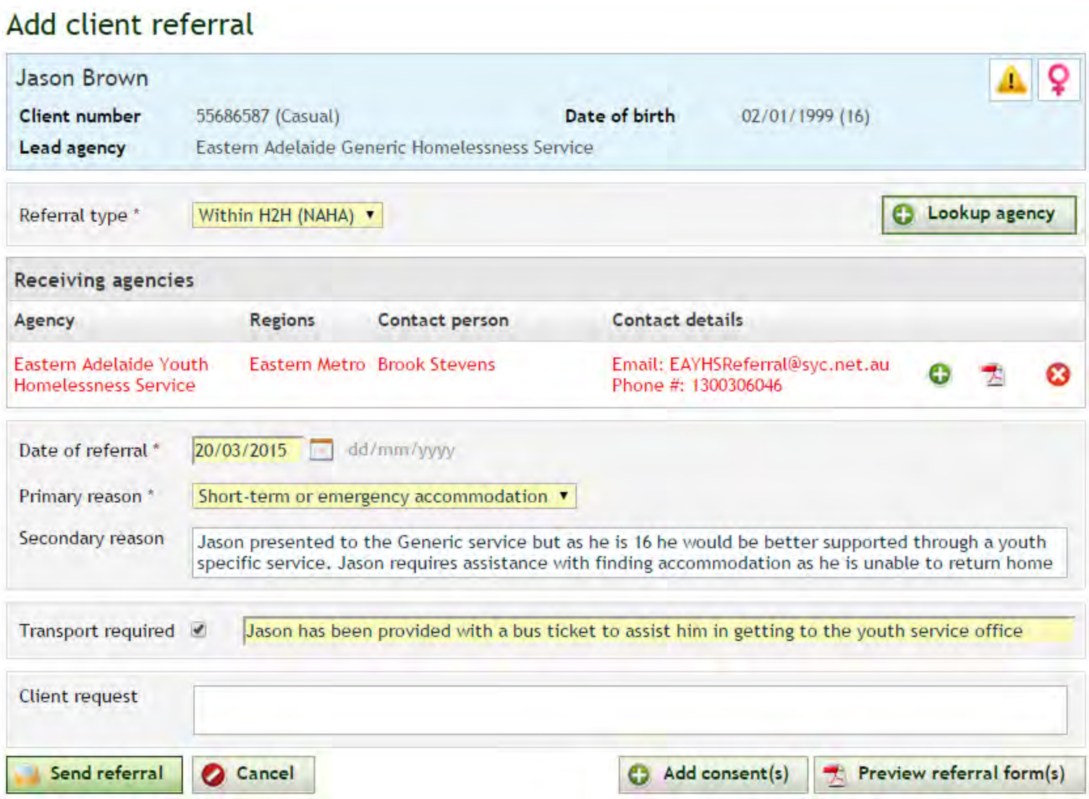
In the Lookup agency pop up, select the region, and the agency within that region that the client is being referred to.



Once the agency has been selected, click the *select agency* button (shown above) to return to the add client referral screen, and complete the remaining fields.

Warm Referrals

Where possible the user should also ensure that they have contacted the new agency to discuss the referral prior to sending on H2H. This ensures the receiving agency has all the information required in order for them to accept the referral and provide the client with the services they require

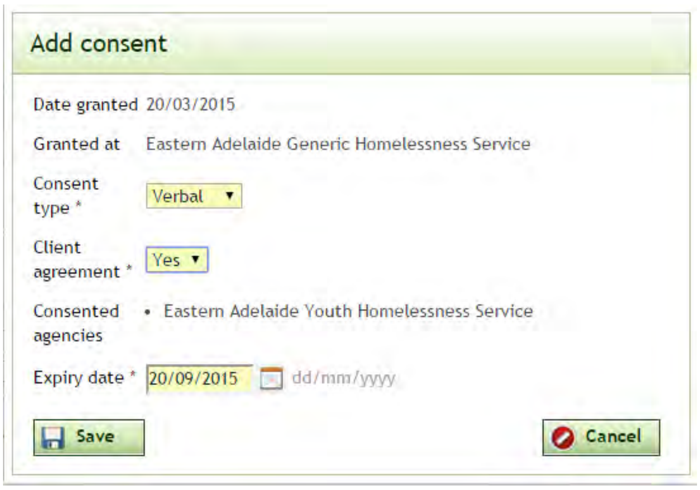


***Please Note**:*

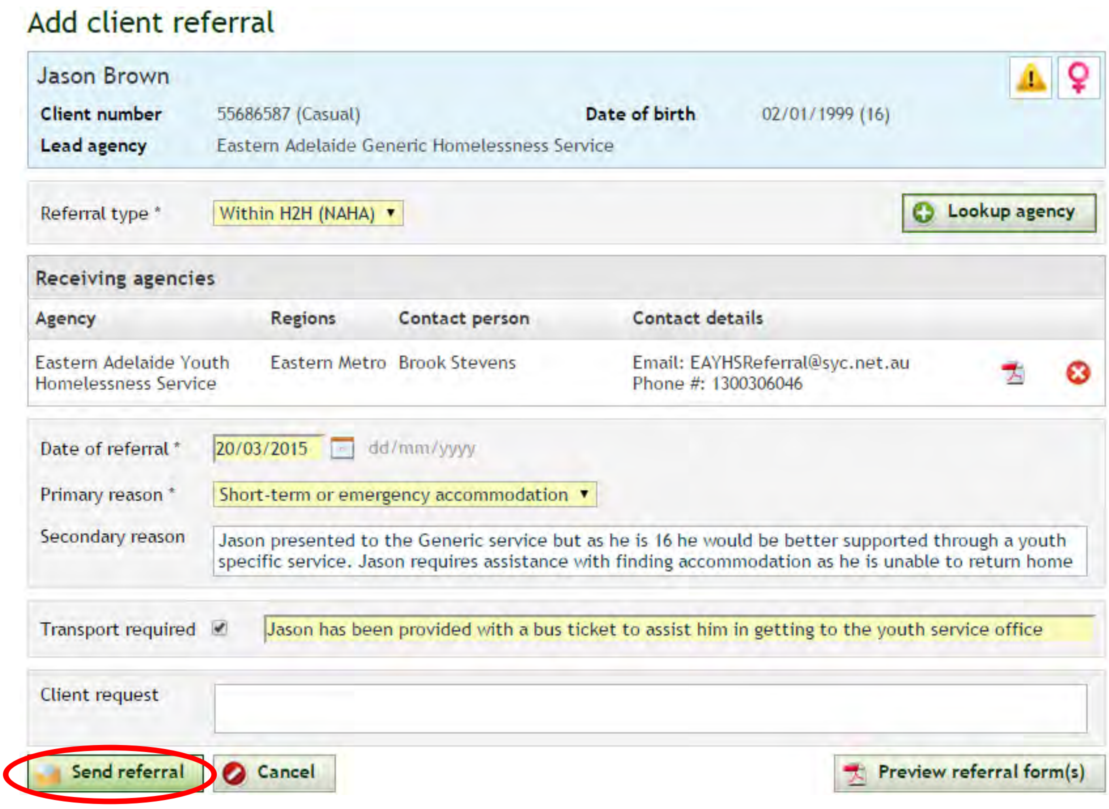
If the wrong agency has been accidentally selected it can be removed from the receiving agencies list by selecting the icon. This can be done before or after consent has been added.

Before the referral can be sent, consent must be added. To add consent, select either the icon in the receiving agencies box, or alternatively, select the ‘Add Consent (s)’ button at the bottom of the screen.

The Add consent popup will then appear;



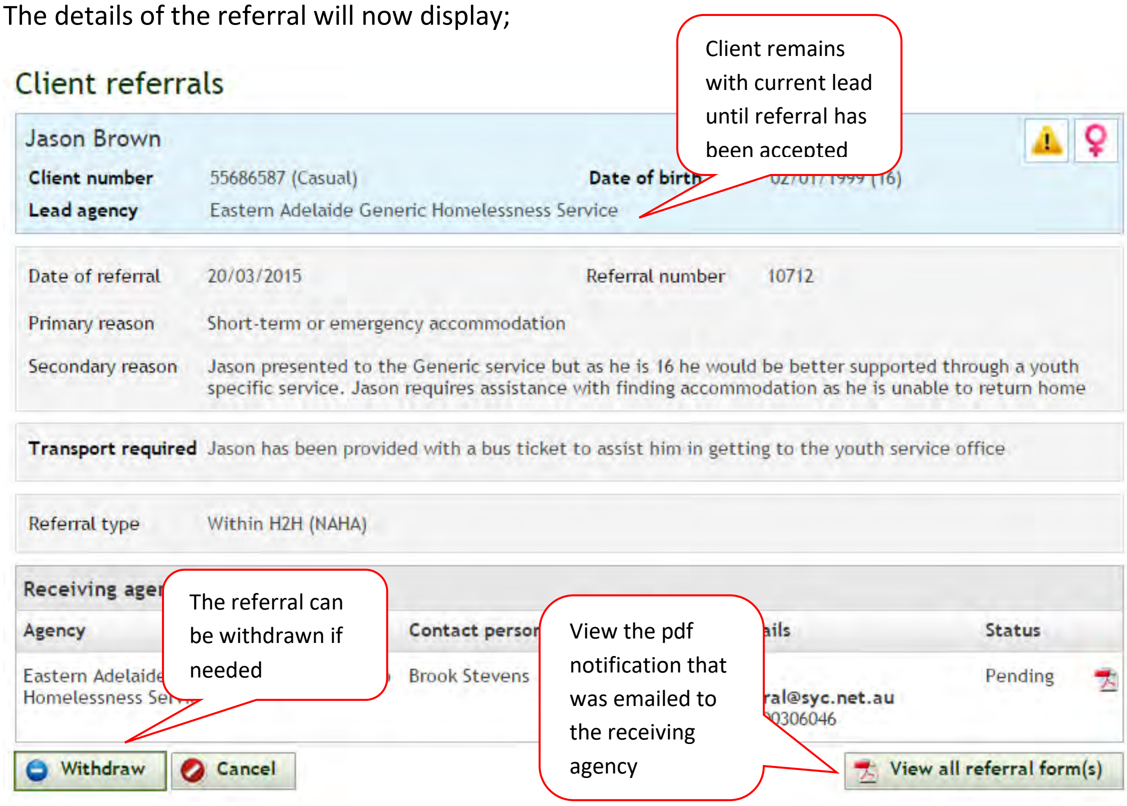
Once the consent has been saved, the receiving agency has been confirmed, the add consent button will no longer be displayed. The referral can now be sent.



> ***Please Note***:
>
> *The referral can be previewed before sending by selecting the pdf icon or the* Preview referral form(s) *button*

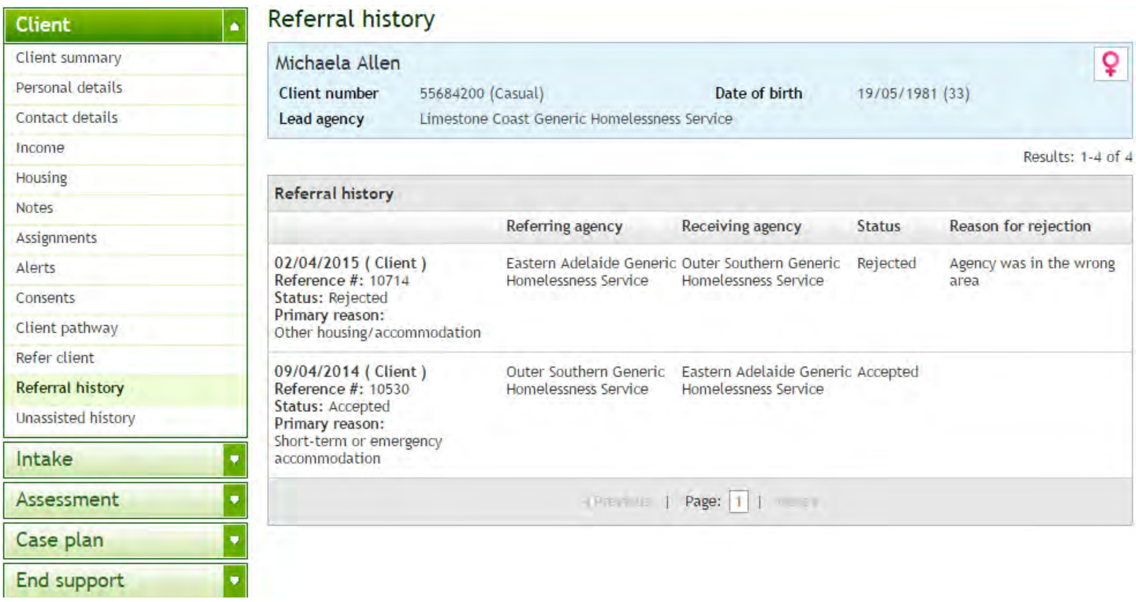
On selection of the ‘send referral’ button, the receiving agency will receive an email to the prefilled email address, to alert them that a client referral has been received, and request that they either accept or reject the referral. See the 'Agency manager section' for further detail on accepting and rejecting referrals.

The details of the referral will now display;



Referral History

The referral history screen is only visible to the current lead agency. The referral history screen in the client menu will display all historical client referrals, whether accepted, rejected or pending;



Historical referral details and pdf referral forms can be viewed by selecting the referral from the list to open.

Unassisted History

Allows you to view all occasions where a client has been unable to be assisted by a SHS and add a new unassisted event. Use the unassisted function if the client has presented but leaves or disengages before being provided with a service. Read on for detail on how to add an unassisted record. The unassisted history screen can be viewed by all users of H2H.

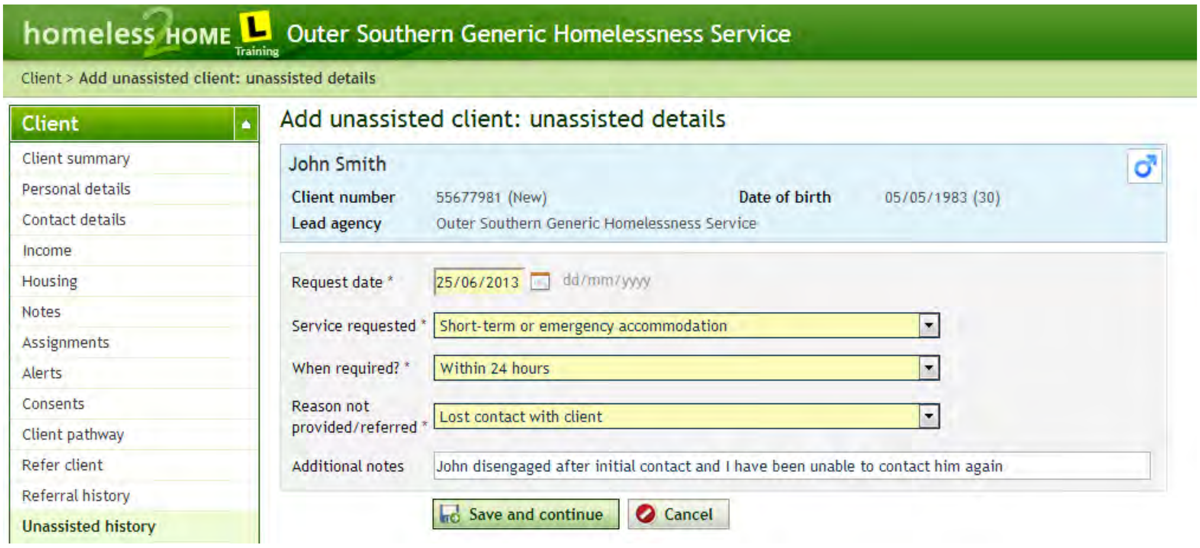
Add unassisted

> ***The AIHW defines an unassisted person as;***
>
> *'any person who seeks services from a specialist homelessness agency and does not receive any services. Services include the provision, referral or assessment of needs…'*

The *save as unassisted* option can be found in 3 places within H2H:

1. At the bottom of the *client details* page when adding a new client.
2. On the *unassisted history* page within the client menu, (only available if no services or assessment has been added).
3. On the *services* page within the intake menu (only available if no services or an assessment has been added).

Selecting the *save as unassisted* button will direct you to the 'Add unassisted client: unassisted details' screen; where you are required to complete the fields shown below;

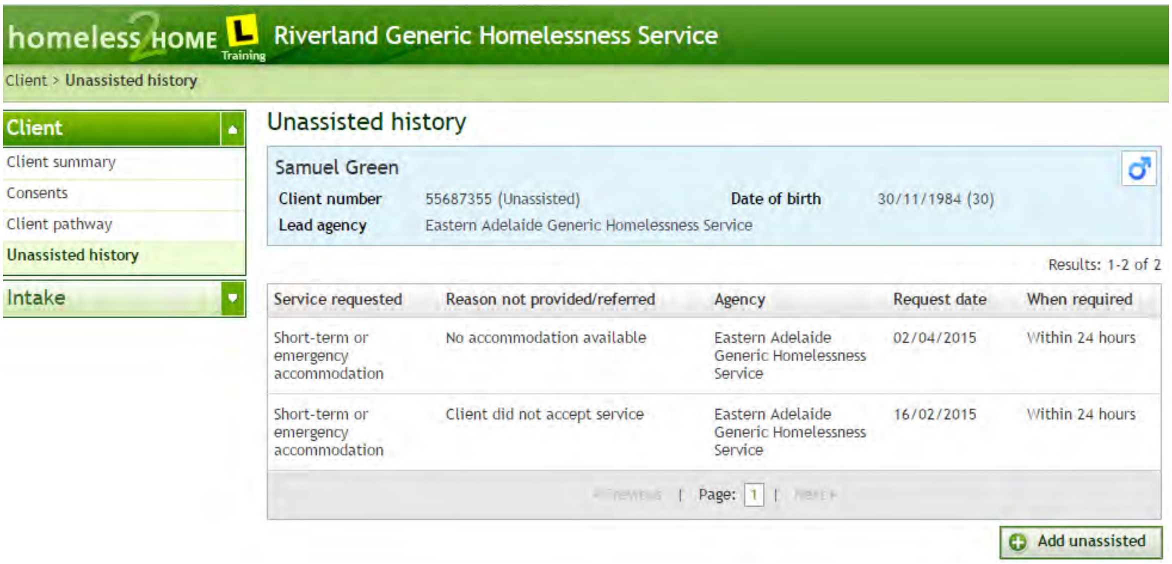


You would use the unassisted function where the client did not accept the assistance offered, disengaged or lost contact with client after commencing a new client record, or where an intake was completed but the client received no services or referrals.

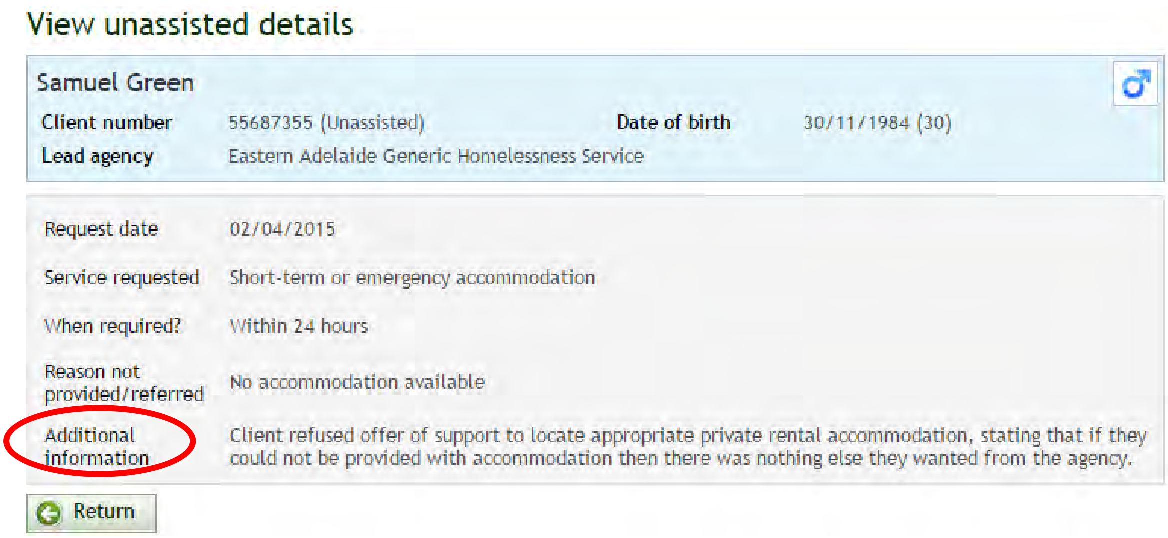
Once the *save and continue* button is clicked the client status becomes *unassisted*. No further support can be entered on the client's record until the client is reactivated by completing a new Intake.

> ***Unassisted vs Inactive:***
>
> *Functionally, the unassisted status is the same as inactive. Both indicate that the record is closed and require a new intake to be re-opened again.*

Where the unassisted was created by another agency, the following is visible;



The agency that created the unassisted record will be able to access the record and view any additional information that was entered at the time. For example;



The Intake Menu

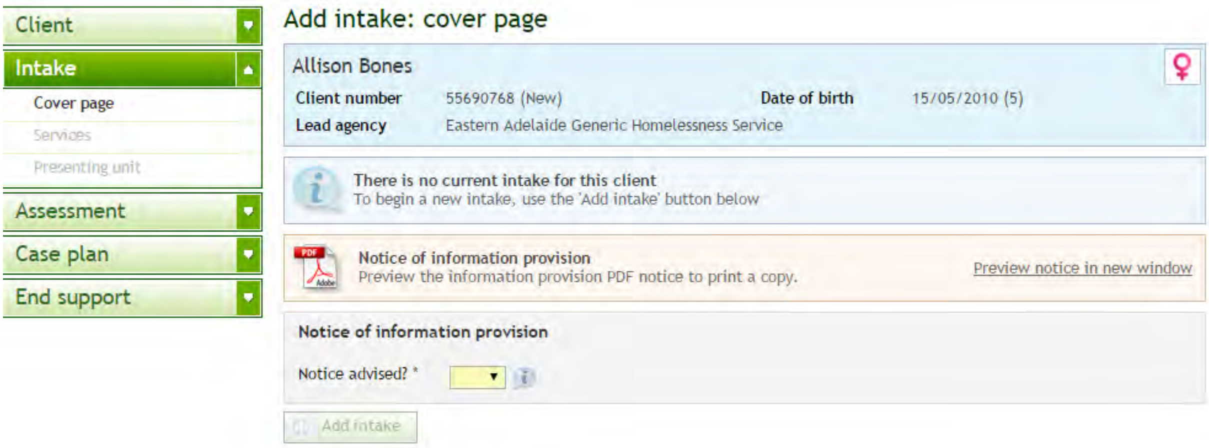
Intake

The period of time that a client receives assistance from your agency is referred to as a support period, and completing an intake is how the support period starts.

Throughout the intake, you will enter information about the client's situation both at presentation to your agency, and the week before presentation. Client outcomes are assessed by using the information you provide about the client at intake, compared to information about the client when you complete an end support or case exit. Missing information or 'don't know' responses mean that It may not be possible to determine if the client situation has improved as a result of working with your agency, so it is very important for you to ensure the client intake is filled out as completely as possible.

Notice of information provision

The first step in starting an intake is completing the *Notice of information provision* (NOIP) panel.

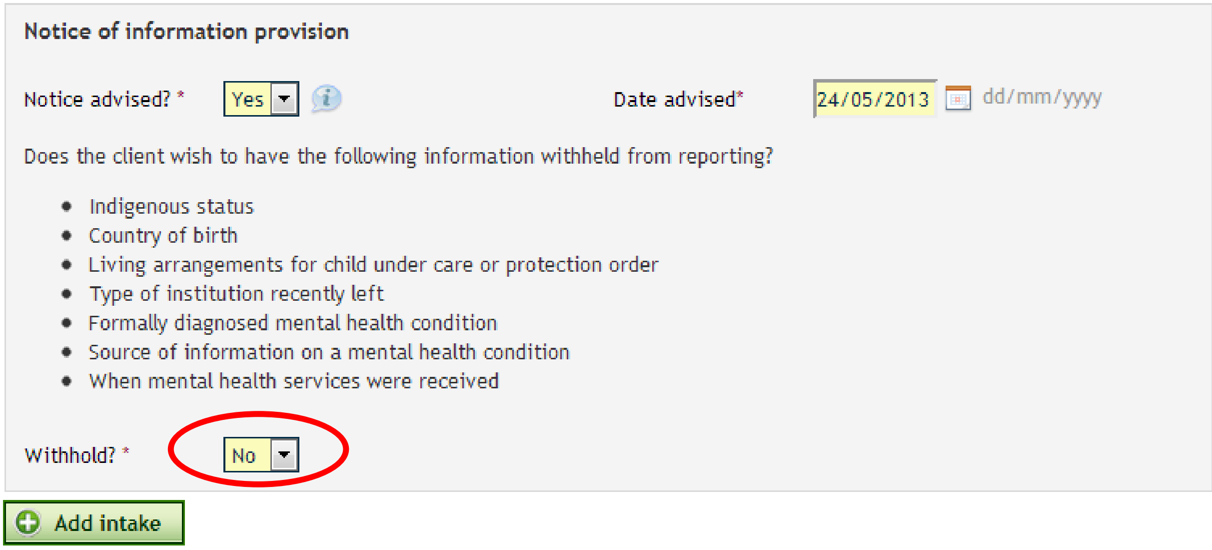


This is a mandatory step and no other intake panels appear until this section is complete. Before client support details can be entered onto H2H, the client must be advised (either verbally or in writing) of the details contained in the NOIP. See the following page for a copy of the NOIP. Indicating that the NOIP has not been provided by selecting 'no', will prevent you from creating an intake. It is your responsibility as a worker to ensure that the client understands what information is being collected, and how it will be used.

The NOIP can be previewed via the link in H2H, and can be accessed on the H2H support page (by clicking the H2H support link at the bottom of every page of H2H),

Once the NOIP has been provided either physically or verbally to the client, the client then has an option to withhold some information from being sent as part of the Specialist Homeless Sector Collection (SHSC). Select 'yes' if the client would like to prevent the listed information from being included in the SHSC. Select 'no' if the client is happy for the information to be provided.

> ***Note:*** *Whether the client chooses to withhold information from reporting or not, the information will still be collected in H2H*


Notice of information provision

Notice advised? * Yes Date advised* 24/05/2013 dd/mm/yyyy

Does the client wish to have the following information withheld from reporting?

- Indigenous status
- Country of birth
- Living arrangements for child under care or protection order
- Type of institution recently left
- Formally diagnosed mental health condition
- Source of information on a mental health condition
- When mental health services were received

Withhold? * No

Add intake

Once a response has been given in each of the mandatory fields (shown above) click the *add intake* button to continue the intake. You will be presented with eight panels to complete to finalise the intake.

homeless2HOME | Government of South Australia | SA Housing Authority

NOTICE OF INFORMATION PROVISION

The information in this form must be given to clients when they present for services (can be provided verbally). This is a mandatory requirement. You must indicate that the client has been given this information in the H2H client and case management system.

I (*client name*)……………………………………………………… understand that:

- I have to give personal information to receive a service
- my personal information will be kept confidential, and will only be seen by people authorised to see it
- my informed consent will be asked for before my personal information is shared with anyone else, and respected in all situations except if any of the below apply:
    - the agency is obliged by law to disclose my information regardless of consent or otherwise - eg an Act of Parliament, a Court Order
    - the agency is authorised under the State Government's Information Privacy Principles[1] or Information Sharing Guidelines[2]
    - it's unsafe or impossible to get my consent
    - it's anticipated that a child, young person or adult will be at risk of serious harm, abuse or neglect, or pose a risk to their own or public health or safety if the information isn't shared.
- my personal information will only be used to:
    - assess the services I may need and develop a plan to provide them to me for the time that I need them
    - provide other Agencies I might present to with relevant information about me, to minimise the need to keep explaining my situation.
- information about me that doesn't personally identify me will be used to both:
    - better plan and coordinate the overall services in general
    - meet funding and reporting requirements.
- I can say no to the following de-personalised information being provided for reporting purposes (if it applies), by advising the Agency that I am currently dealing with:
    - my Aboriginal and/ or Torres Strait Islander status
    - my country of birth
    - any living arrangements for children who are on care or protection orders
    - the type of institution I recently left
    - any formally diagnosed mental health conditions
    - the source of information on my mental health conditions
    - when I received any mental health services.
- I can access my personal information by asking any Agency I am dealing with.

Date………………………… Client Signature:…………………………………………………

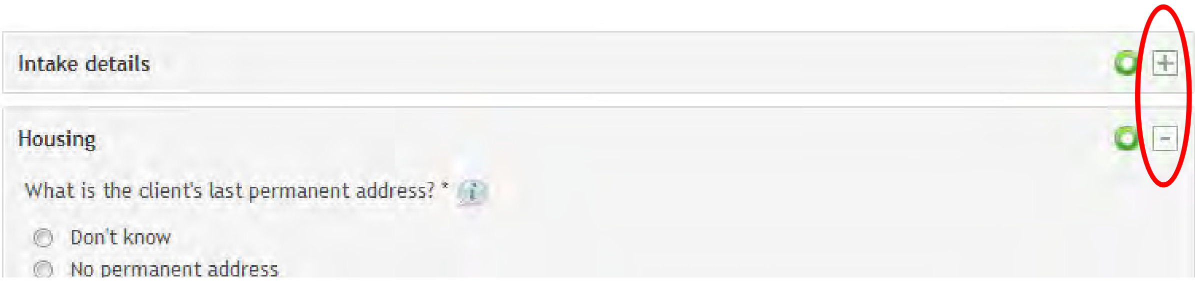
Tick if verbal approval was provided rather than written ☐

[1] *Available at* https://www.dpc.sa.gov.au/resources-and-publications/premier-and-cabinet-circulars/DPC-Circular-Information-Privacy-Principles-IPPS-Instruction.pdf
[2] *Available at* https://www.dpc.sa.gov.au/__data/assets/pdf_file/0009/45396/Information-Sharing-Guidelines.pdf

How the intake works

The intake is divided up into a series of panels. If the client record has a status of new (an intake has never been completed before) then most panels will have no information entered. If the client has engaged with the homelessness sector before, then some panels will contain information for review and update.

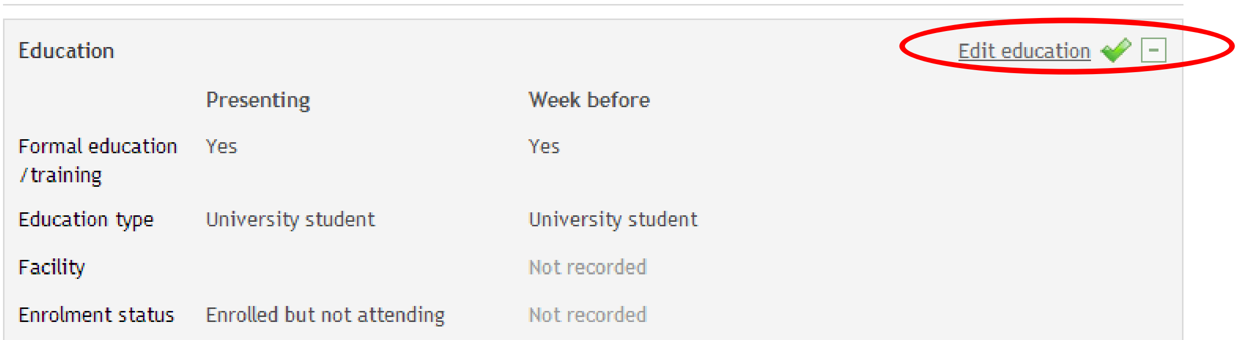
These panels can be expanded and collapsed by clicking on the + or – symbol in the top right-hand corner of each panel (as shown below).



Once a panel has been filled in correctly, the 

button becomes available at the bottom of the panel.

Once this button is clicked the panel changes to a *view mode*. In view mode the details cannot be edited, and a green tick appears in the top right-hand corner (as shown below). You are then automatically directed to the next panel. If you need to edit any of the details within a panel that has been confirmed, you can click the *edit* button in the top right-hand corner. This will then change the panel back to edit mode, so you can change details.

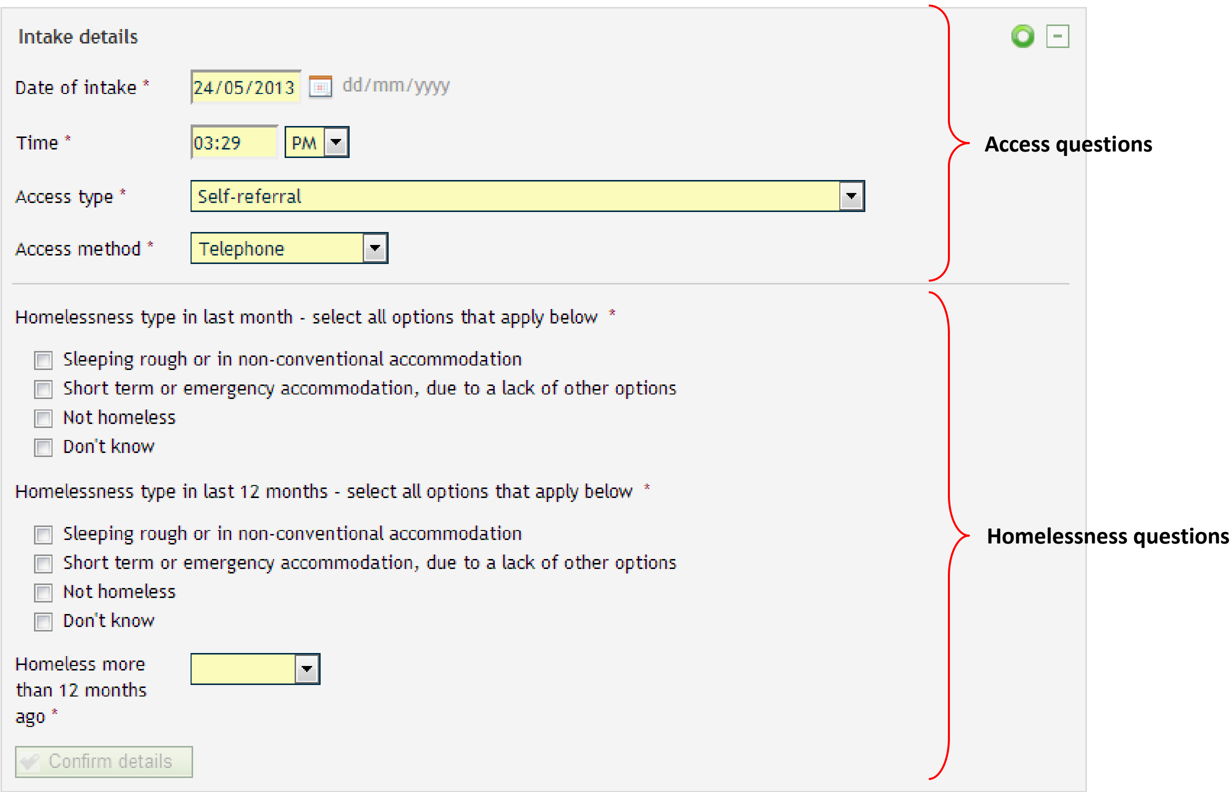


Once all panels are complete (all panels have a green tick in the top corner) the *Complete intake* button will be available at the bottom of the page.

> ***Note:** if this button is greyed out, it means one or more panels have not been completed.*

Intake details panel

The first panel is the *Intake details* panel. This is where information is recorded about how the client came to your agency and their homelessness history. This panel is broken up into two sections, access questions, and homelessness history questions;



Access Questions

You are required to enter a date and time of intake. The date of intake can be backdated to an earlier date providing that:

- The date is within the current month,
- The intake date is not before the date of first contact

Next, specify the access type and access method. The access type is how the client presented to your agency. The Access method is how initial contact was made with your agency. Definitions of when to use the different responses are outlined below.

Access type definitions	
Self-referral	The client approached the agency without any referral from any other person or agency.
Family/Friend referral	The client heard about the agency from a family or friend, or a family/friend contacted on the client’s behalf.
Formal Referral	Another worker, group, or organisation formally referred the client to your agency. This may have been another NAHA service or a non-NAHA service by phone, fax or email.
No formal referral	The client obtained your agency details from another worker, group or organisation, but contacted your agency themselves and there was no contact from the other worker, group or organisation.
Other - specify	Any other form of referral that does not fit in the above categories.
Don’t know	The client does not know or is unable to tell you how they came to access your agency.

Access method definitions	
Walk in	The client has presented to the agency with no preceding phone call or booked appointment time.
Telephone	The client has contacted the agency themselves via telephone.
Third Party	Someone has contacted the agency on the client’s behalf i.e. they may have been referred by the courts, police, or a friend or family member.
Outreach	The first contact with the client occurred not in an office setting, e.g. an agency that runs an outreach session at a community centre, or a client who approaches whilst a worker is on a home visit with an existing client.
Assertive Outreach	This access method should only be selected by agencies that are funded to provide assertive outreach and have contacted the client through an assertive outreach program.
Early Intervention	The first contact with the client occurred prior to them becoming homeless, e.g. at a group session, through a school's program etc.

Homelessness Questions

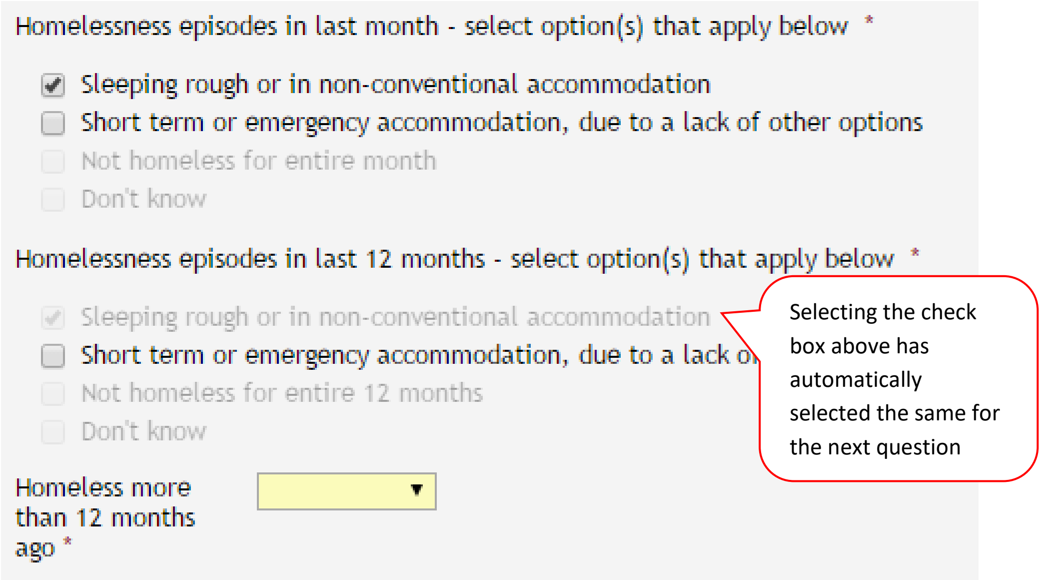
The last three questions in the intake details panel are in relation to the client's homelessness history. You will need to enter if the client has been homeless, and the type of homelessness, within the last month, 12 months or more than 12 months ago. It is important to note that client circumstances may require selection of more than one of the options provided in the 'one month' and '12 month' categories.

Homelessness type definitions	
Sleeping rough or in non-conventional accommodation	The client has been living on the streets, sleeping in parks, squatting, staying in cars or railway carriages, living in improvised dwellings or living in the long grass.
Short-term or emergency accommodation, due to a lack of other options	The client has been living in any of the following situations; - Refuges - Crisis shelters - Couch surfing - Living temporarily with friends and relatives - Insecure accommodation on a short-term basis - emergency accommodation arranged in hotels, motels etc. by a specialist homelessness agency
Not Homeless	The client has not been homeless within the last month/12 months.
Don't Know	The information is not known, or the client has refused to provide the information.

Please Note: *the following short-term accommodation options are* ***not*** *considered to be homeless;*

- *Hotels, motels, caravan parks and other temporary accommodation used when a person is on holiday or travelling.*
- *Custodial and care arrangements, e.g. prisons or hospitals.*
- *Temporary accommodation used by a person while renovating their usual residence or building a new residence (for example, weekenders, caravans)*

You will notice that if you select a homelessness type in the last month, H2H will pre-fill that information into the *last 12 months* category. For example;


Homelessness episodes in last month - select option(s) that apply below *

- [x] Sleeping rough or in non-conventional accommodation
- [ ] Short term or emergency accommodation, due to a lack of other options
- [ ] Not homeless for entire month
- [ ] Don't know

Homelessness episodes in last 12 months - select option(s) that apply below *

- [x] Sleeping rough or in non-conventional accommodation
- [ ] Short term or emergency accommodation, due to a lack o
- [ ] Not homeless for entire 12 months
- [ ] Don't know

Homeless more than 12 months ago *

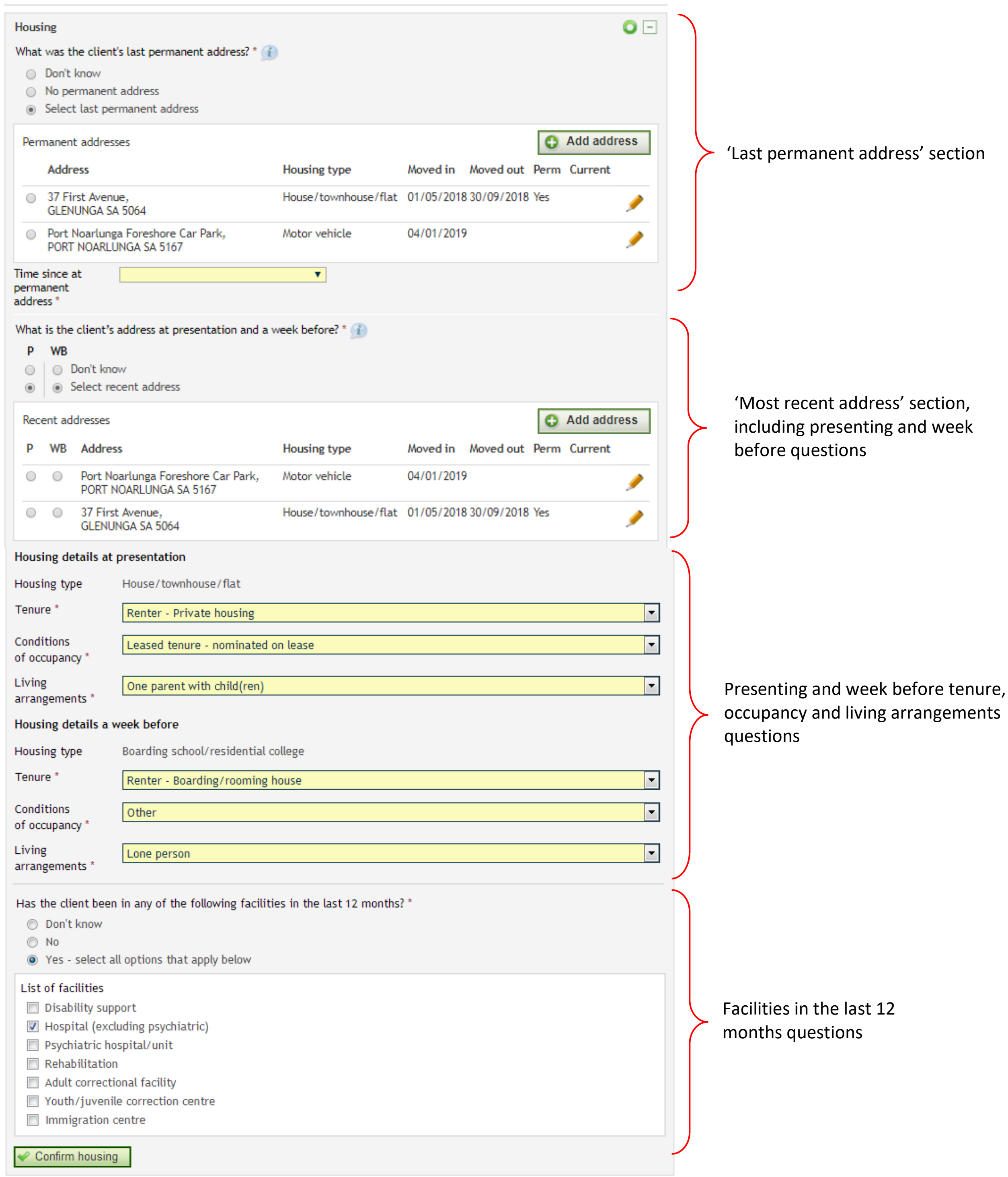
Selecting the check box above has automatically selected the same for the next question

This is because the last 12 months is inclusive of the last month, therefore if a person was homeless in the last month, then they were by default homeless in the last 12 months.

When answering the question regarding a client's homelessness more than 12 months ago, your answer will be 'yes' if the client has been homeless at <u>any</u> time in their life up until 12 months ago.

The Housing panel

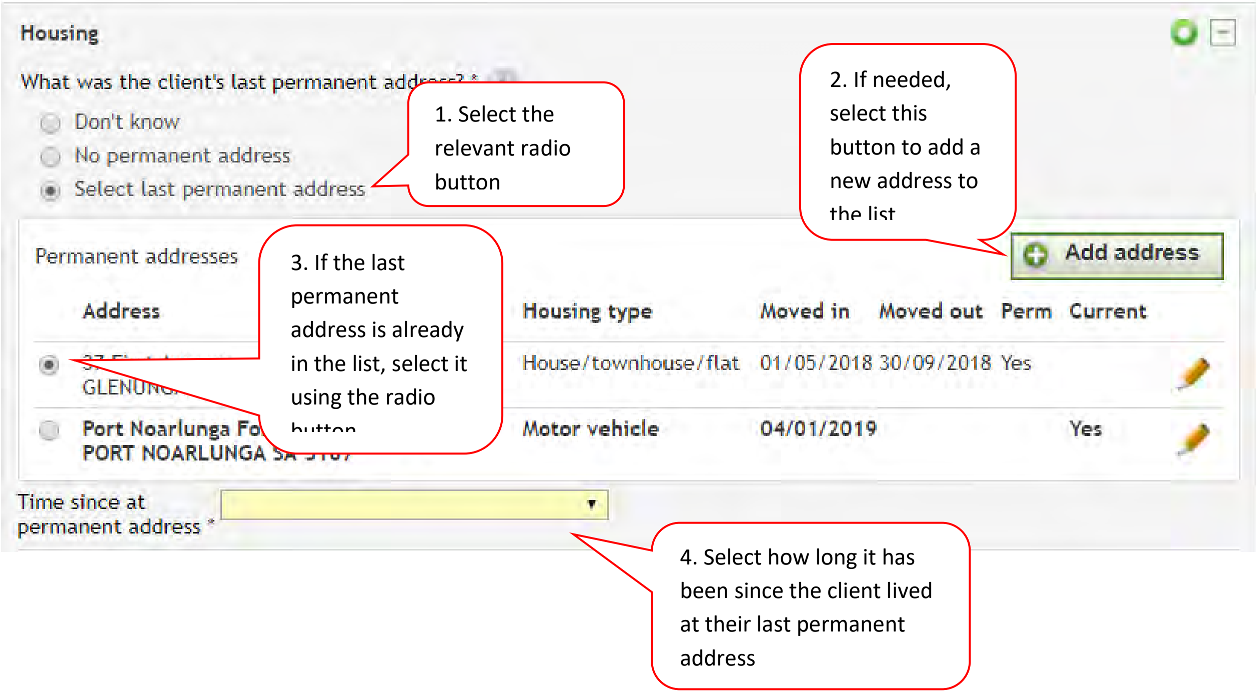
Within the housing panel, you will be required to enter specific information regarding the clients housing history, housing details at the time the client presented to your agency and a week before the client presented to your agency. Information is also collected regarding history of stays in facilities in the last 12 months.



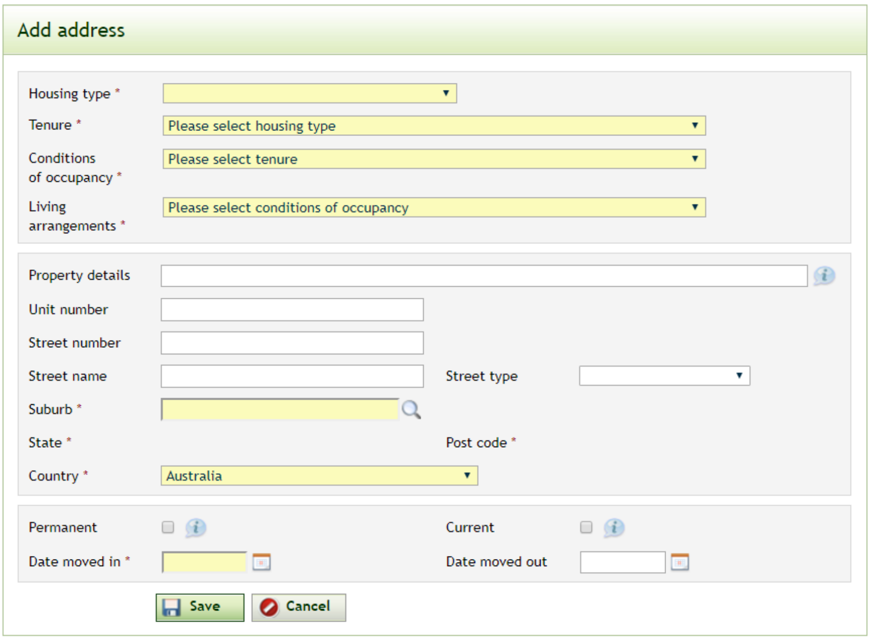
The first information required is in relation to the client's last permanent address.

> ***Permanent address:*** *an address in a conventional dwelling, where the client had some form of tenure, and resided at for at least 3 months*

Any addresses previously saved on the client housing record from previous support periods or added in the *add client* process will automatically appear in the housing tables within this panel.

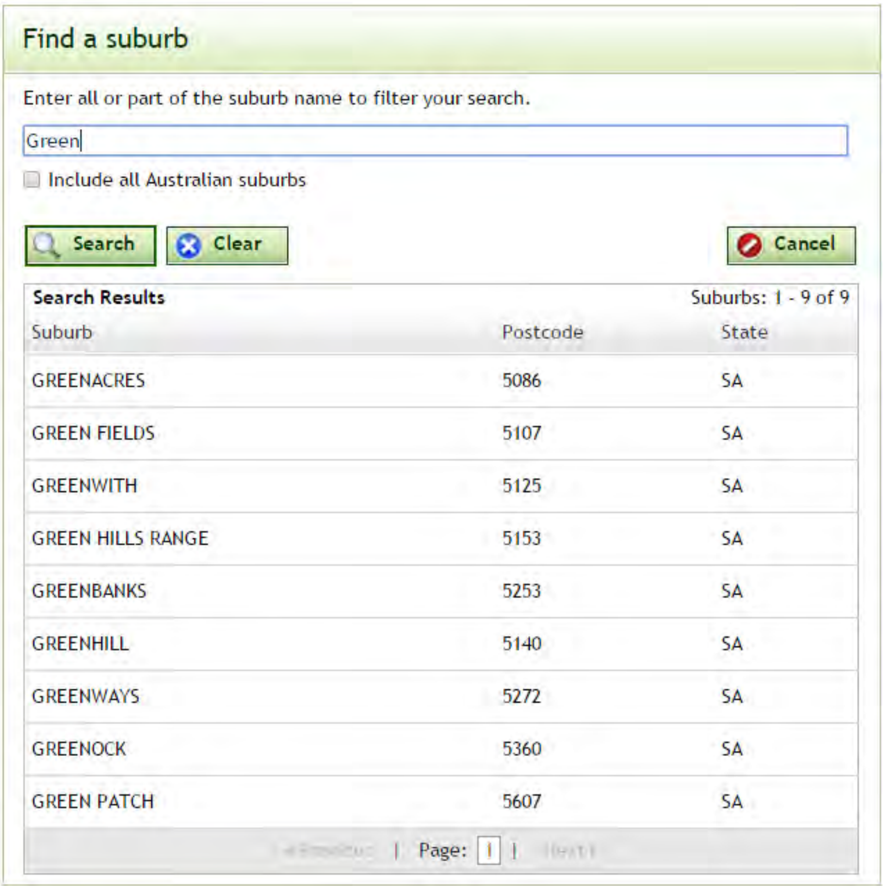


If you need to add a new address to the housing panel, click the Add address button. The following popup will appear:



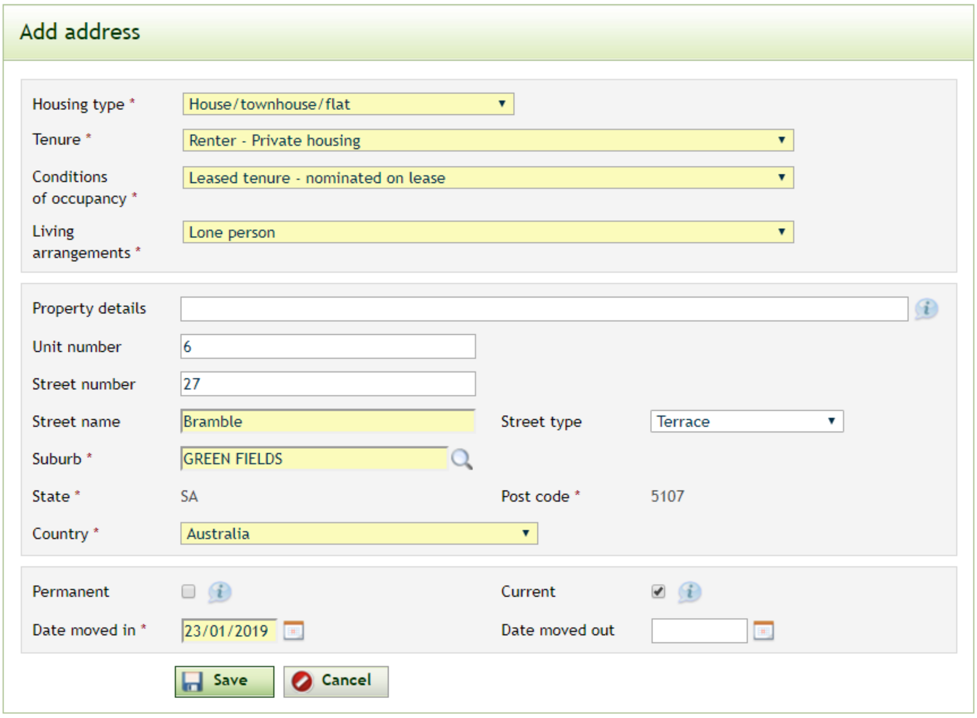
Complete all mandatory fields as required.

Selecting the icon will bring up the ‘Find a suburb’ tool, where you can search for all or part of a suburb name, or select the checkbox to search all Australian suburbs. For example, a search for suburbs containing the word ‘Green’ would appear as follows;



You can select the correct suburb with a single click anywhere on the search result line.

Once selected the suburb name, state and postcode will be entered into the address, as seen below;



For each address you can also indicate

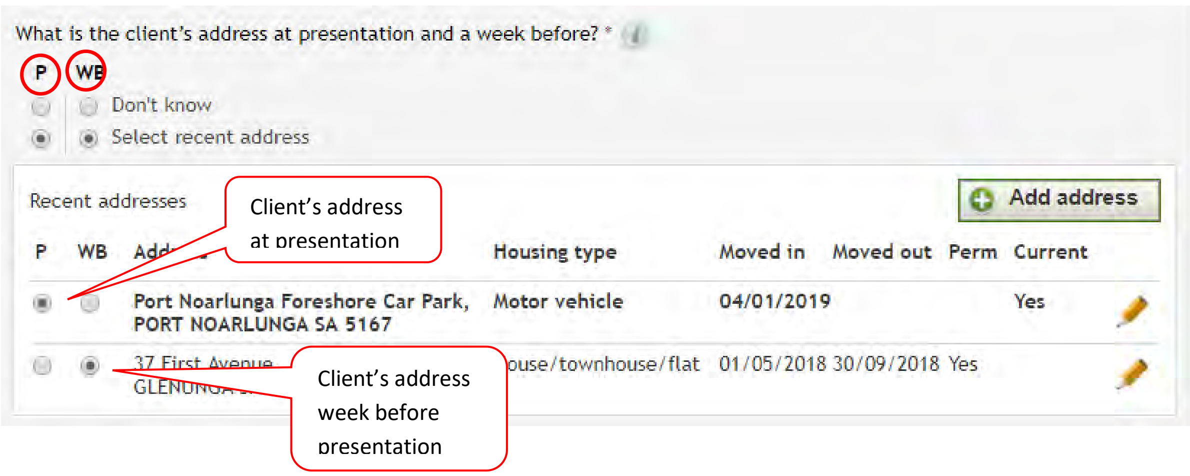
whether this address was a permanent address (*Tenure in a conventional dwelling for at least 3 months*), and/or the current address (*select to indicate if this is the client's current living situation*). Once all mandatory fields have been completed the address can be saved. The address will then appear in the housing panel.

If you notice a mistake is made when adding an address, or an address previously entered is incorrect you can edit it by clicking on the pencil icon in the corresponding row.

> ***Please Note:*** *an address that has been used in previous intakes cannot be edited. This will be indicated by a greyed-out edit pencil.*

Next, you are required to enter the address at *presentation* to your agency and a *week before* presentation. You will notice the two columns of radio buttons to select that correspond to *presenting* **(P)** and *week before* **(WB).** Select the correct addresses from the 'most recent address' table or add an address if required by clicking the *add address* button and completing the pop-up box as shown above.

> ***Please note:*** *information about address at presentation is extremely important. The 'house type' field is used to establish whether a client was homeless at the time they first presented to your agency or not. A 'don't know' response to this question will result in unknown housing status at the start of support*



Next you will be required to confirm the tenure, conditions of occupancy and living arrangements, firstly for the address at presentation and then for the week before address (as shown on next page). All these fields are prefilled from the address when you select it with the radio buttons

Housing details at presentation

Housing type	House/townhouse/flat
Tenure *	Renter - Private housing
Conditions of occupancy *	Leased tenure - nominated on lease
Living arrangements *	Lone person

Housing details a week before

Housing type	No dwelling/street/park/in the open
Tenure *	No tenure
Conditions of occupancy *	Other
Living arrangements *	Lone person

Confirm the displayed information is correct, especially if using an existing address.

Definitions for tenure, conditions of occupancy and living arrangement responses can be found below, or in the Specialist Homelessness Services Collection Manual.

Tenure type collects information on whether a dwelling is owned or rented, or whether the client was living there rent-free. It also provides more detailed information on emergency accommodation – including whether a client is paying a fee or not

Tenure Type Defintions	
Renter – private housing	A client renting a dwelling owned by a private individual(s) or a private business. It is NOT owned by a government body or a housing association, housing cooperative or other not-for-profit community service organisation
Renter – public housing	A client renting a dwelling owned/controlled by a government body or government authority
Renter – community housing	A client renting a dwelling owned/controlled by a housing association, housing cooperative or other not-for-profit community service organisation
Renter – transitional housing	A client renting accommodation provided through a government-funded agency. The accommodation is generally more stable and provided for longer than crisis accommodation, and is linked to external support through an agency
Renter – caravan park	A client renting a cabin or caravan in a caravan park

Renter – boarding/rooming house	A client renting a room or rooms in a boarding or rooming house
Renter – emergency accommodation/night shelter/women's refuge/youth shelter	a client paying rent for emergency accommodation, a night shelter, women's refuge or youth refuge
Other renter	a client renting accommodation that is not included in the categories above
Rent free-private housing	a client staying rent free at a dwelling owned by a private individual(s) or a private business. It is NOT owned by a government body or a housing association, housing cooperative or other not-for-profit community service organisation
Rent free – public housing	a client staying rent free at a dwelling owned/controlled by a government body or government authority
Rent free – community housing	a client staying rent free at a dwelling owned/controlled by a housing association, housing cooperative or other not-for-profit community service organisation
Rent free – transitional housing	a client staying rent free at accommodation provided through a government-funded agency. The accommodation is generally more stable and provided for longer than crisis accommodation, and is linked to external support through an agency
Rent free – caravan park	a client staying rent free in a cabin or caravan in a caravan park
Rent free – boarding rooming house	a client staying rent free in a room or rooms in a boarding or rooming house
Rent free - emergency accommodation/night shelter/women's refuge/youth shelter	a client staying rent free in emergency accommodation, a night shelter, women's refuge or youth refuge
Other rent free	a client staying rent free in accommodation that is not included in the categories above
Life tenure scheme	A client with a contract to live in the dwelling for the term of their life but without the full rights of ownership and usually with limited or no

	equity in the dwelling. This is a common arrangement in retirement villages
Owner – shared equity or rent/buy scheme	A client who is purchasing a proportion of the equity in the dwelling, and paying rent for the remainder
Owner – being purchased/with mortgage	the client owns their dwelling and is repaying a mortgage or loans secured against the dwelling, regardless of the purpose of the mortgage or secured loan
Owner –fully owned	the client owns their dwelling and is not making any payments on mortgages or loans secured against the dwelling. A client who has repaid a loan, but technically not discharged the associated mortgage
Other tenure type not elsewhere specified	A client with tenure that does not fit any of the above categories includes clients who are house sitting or receiving payment in kind for a specific service, such as a live-in nanny
No tenure	The client is sleeping rough or does not have a legal right to occupy a dwelling and can be asked to leave at any time includes couch surfing, living on the streets, sleeping in parks, squatting, using cars or railway carriages, improvised dwellings, or living in the long grass includes living in an institutional setting, such as a hospital, psychiatric hospital/unit, disability support unit, rehabilitation facility, adult correctional facility, youth/juvenile justice detention centre, boarding school/residential college, aged care facility or immigration detention centre
Don't know	the information is not known, or the client has refused to provide the information

The conditions of occupancy questions provide more detailed information about a client's tenure. For example;

- If the client was renting in public housing, was their name on the lease?
- If the client's tenure was rent free in public housing, were they couch surfing or living with a relative fee free?
- If a client has been living rough, select *not applicable* for conditions of occupancy

Occupancy Condition Definitions	
Leased tenure – nominated on lease	A client who is renting and is listed on the contract for the lease A client who has tenure with a rent/buy scheme
Lease in place – not nominated on lease	a client who is living in accommodation where a lease is in place, but the client is not named on the lease agreement
Couch surfer	a client who typically moves from household to household intermittently, who is not regarded as being part of those households, and who does not have any form of leased tenure over any accommodation
Boarder	a client who is boarding, and who is supplied with meals and/or lodging in return for payment
Living with relative fee free	a client who is related to a member of a household, and who is not paying a fee for their lodging a child who is living with a parent wo either owns or is renting the dwelling
Other	a type of arrangement that is not listed in the categories above
Don't know	the information is not known, or the client has refused to provide the information
Not applicable	a client has no tenure, and they are not a *couch surfer* or *living with a relative fee free* A client's tenure is a life tenure scheme a client has no tenure where they have been living in an institutional setting a client who owns their own home

Living arrangement information is used to indicate the group of people that the client lives with. You should record the category that best describes this group of people. This should not be confused with the presenting unit. Children should be recorded as the group that best describes their situation; for example, if living with both parents, you would record *couple with child(ren)*

Living Arrangement Definitions	
Lone Person	The client lives along. This includes living alone (without family) in an institution
One parent with child(ren)	the client is a single parent living with their child(ren) the client is a child living with a single parent includes step and adopted parent/child relationships
Couple with child(ren)	the client is a parent living with their spouse/partner and their child(ren) the client is a child living with both parents includes step and adopted parent/child relationships
Couple without child(ren)	the client is living with their spouse/partner only
Other family	includes all other groups with related individuals, including siblings and families or more than two generations
Group	includes two or more unrelated persons who live together situations where boarders or lodgers live with a family excludes persons living alone (without family) in institutions
Don't know	where you are unable to determine the living arrangements of the client

Once you have completed the presentation and week before housing information, the last question in the housing panel asks whether the client has previously lived in certain facilities in the last 12 months.

Has the client been in any of the following facilities in the last 12 months? *

- ○ Don't know
- ○ No
- ● Yes - select all options that apply below

List of facilities

- ☐ Disability support
- ☐ Hospital (excluding psychiatric)
- ☐ Psychiatric hospital/unit
- ☐ Rehabilitation
- ☑ Adult correctional facility
- ☐ Youth/juvenile correction centre
- ☐ Immigration centre

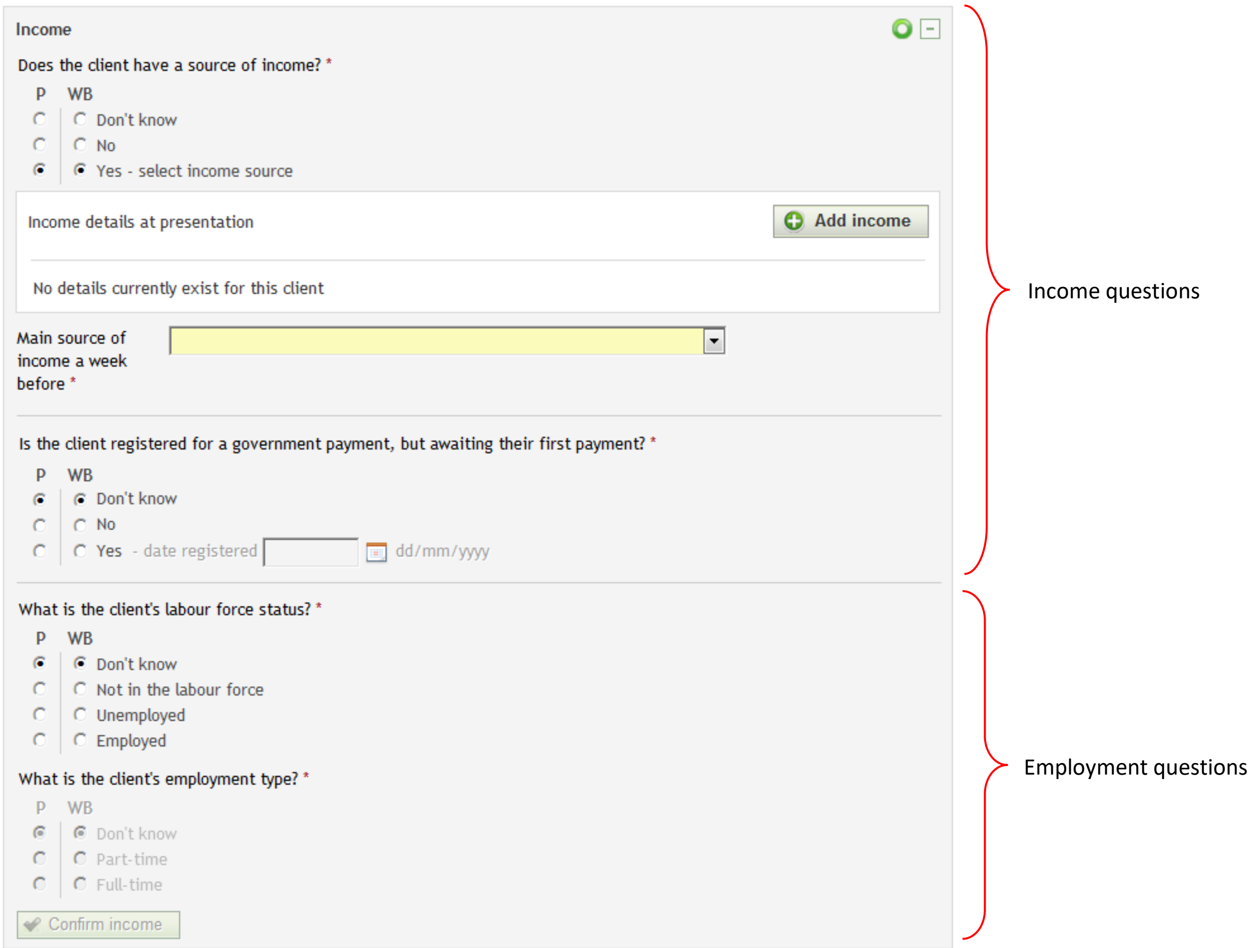
If known, select as many as apply from the list provided. Once every question in the housing panel is completed, the *Confirm housing* button will become available. Click this to proceed to the next panel. The information entered will now be visible in a view mode.

Housing — Edit housing

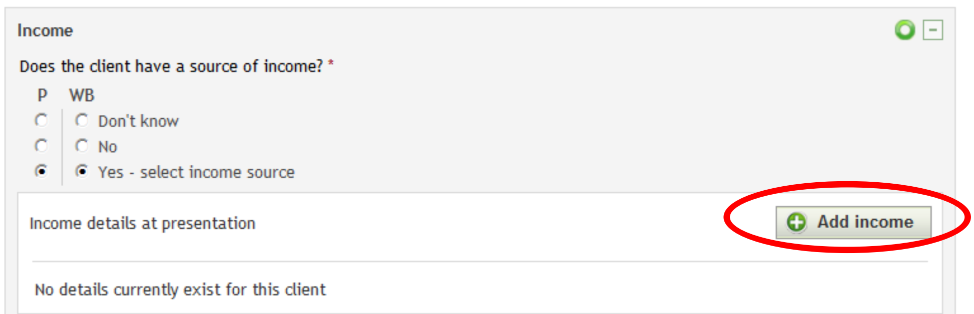
	Presenting	Week before	Last permanent
Address	ADELAIDE SA 5000	17 Hutt Avenue, BROMPTON SA 5007	63 First Street, GLENUNGA SA 5064
Permanent			Yes
Housing type	No dwelling/street/park/in the open	House/townhouse/flat	House/townhouse/flat
Tenure	No tenure	Renter - Private housing	*Not recorded*
Conditions of occupancy	Other	Leased tenure - nominated on lease	*Not recorded*
Living arrangements	Lone person	Lone person	*Not recorded*
Time since at permanent address	*Not recorded*	*Not recorded*	More than 1 month, to 6 months ago
Facilities in the last 12 months	Adult correctional facility		

The Income panel

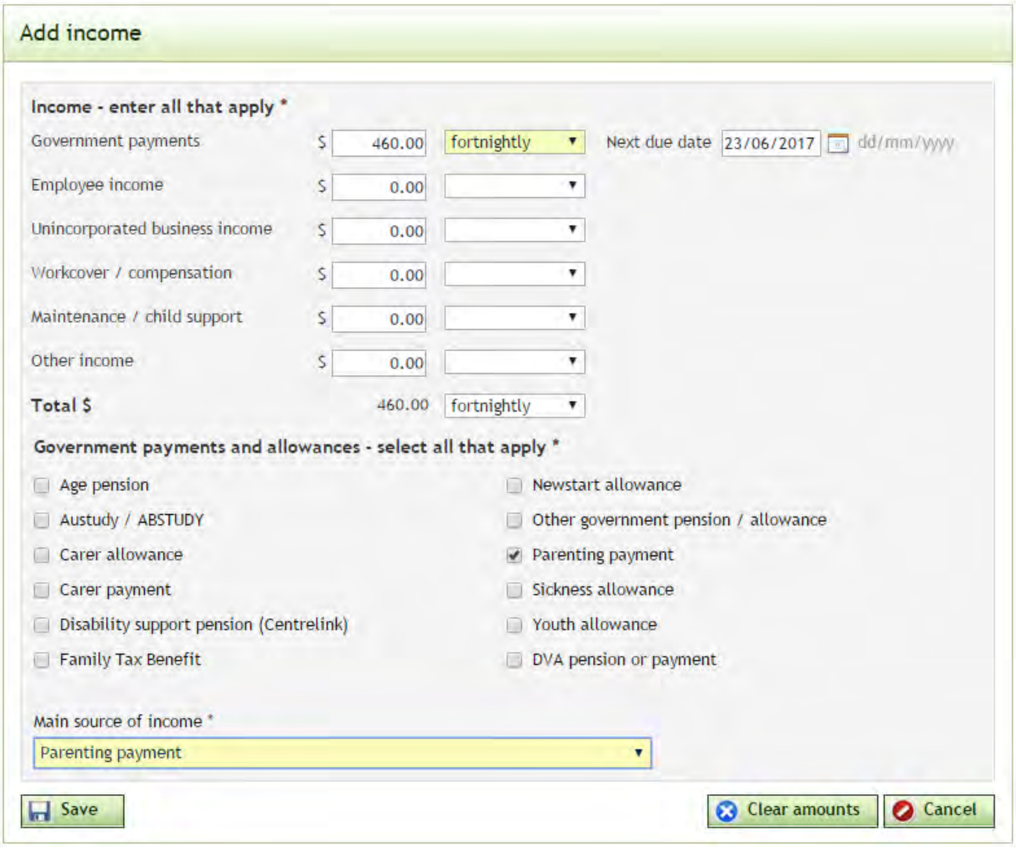
Within the income panel, you will find a series of questions about your client's income and employment status. Like in the housing panel, you will again be asked to provide information relating to the client circumstances upon presentation(**P**) and week before presentation (**WB**).



The first question asks if the client has a source of income at presentation and the week before. If you select yes, the income details field directly below this question becomes available. In this section you can add a source of income or edit a source if one already exists.



If no income details currently exist, press the *Add income* button, and the following pop-up appears:



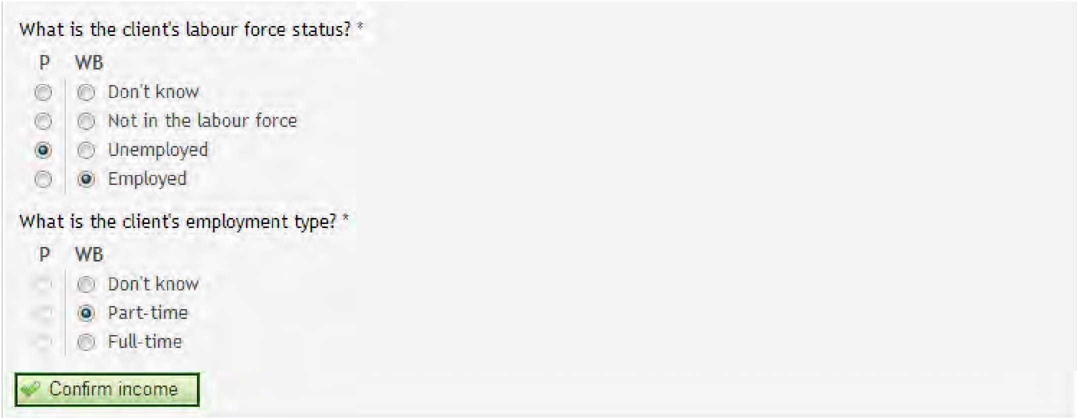
> ***Please note:*** *income amounts entered are not collected for reporting purposes. The income amount can be estimated if you do not have an exact amount.*

Enter the relevant information and save. Once the pop-up has been saved, the income details will now be displayed in the income table as shown below:

Next you will need to indicate whether the client has already registered for a government payment but has not yet started receiving this payment. You will need to answer this question for both the clients' status upon Presentation to your agency, and week before presentation.

> ***E.g.*** *For a client who has recently become unemployed, and has applied for a newstart payment, but has not started receiving the payment yet, select yes, and enter the date the client first applied for the payment.*

Following this you will need to provide information on the client's labour force status (is the client employed) and what type of employment they are involved in (part time or full time). You will notice that the employment type question only becomes available if it is previously indicated that the client is employed.


What is the client's labour force status? *
P WB
Don't know
Not in the labour force
Unemployed
Employed
What is the client's employment type? *
P WB
Don't know
Part-time
Full-time
Confirm income

Whether a client is employed or not is an important indicator of socioeconomic status of a person, and a key element in measuring whether provided supports were able to improve the employment status of clients between start and end of support, an important outcome indicator.

Labour force definitions	
Employed	Includes clients aged 15 years and over who during the reference week: a) Worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising 'Employees', 'Employers' and 'Own Account Workers'). b) Worked for one hour or more without pay in a family business or on a farm (i.e. ‘Contributing Family Worker'.) c) Were 'Employees' who had a job but were not at work and were: • on paid leave • on leave without pay, for less than four weeks, up to the end of the reference week • stood down without pay because of bad weather or plant breakdown at their place of employment, for less than four weeks up to the end of the reference week • on strike or locked out • on workers' compensation and expected to be returning to their job, or • receiving wages or salary while undertaking full-time study. d) Were 'Employers', 'Own Account Workers' or 'Contributing Family Workers' who had a job, business or farm, but were not at work.
Unemployed	Refers to clients who are aged 15 years and over, were not employed, and:

	a) Had actively looked for full-time or part-time work at any time in the four weeks up to the end of the reference week and were available for work in the reference week or would have been available except for temporary illness (i.e. lasting for less than four weeks to the end of the reference week). b) Were waiting to start a new job within four weeks from the end of the reference week and would have started in the reference week if the job had been available then. c) Were waiting to be called back to a full-time or part-time job from which they had been stood down without pay for less than four weeks up to the end of the reference week (including the whole of the reference week) for reasons other than bad weather or plant breakdown.
Not in the labour force	Refers to clients aged 15 years and over who were not employed or unemployed, as defined above. Includes clients who were keeping house (unpaid), retired, voluntarily inactive, permanently unable to work, in institutions (hospitals, gaols, sanatoriums etc.), trainee teachers, members of contemplative religious orders, and whose only activity during the reference week was jury service or unpaid voluntary work for a charitable organisation.

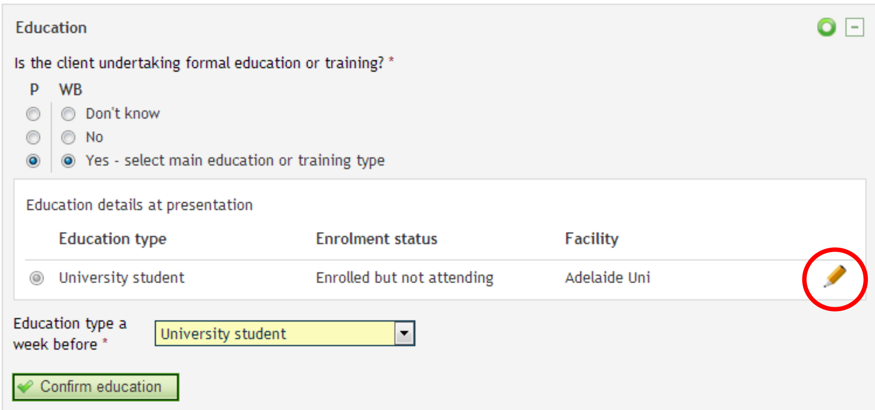
Employment type definitions	
Full time	The client usually works 35 hours or more in a week.
Part time	Usually works less than 35 hours a week (in all paid jobs). (Add a link to the SHS collection manual)

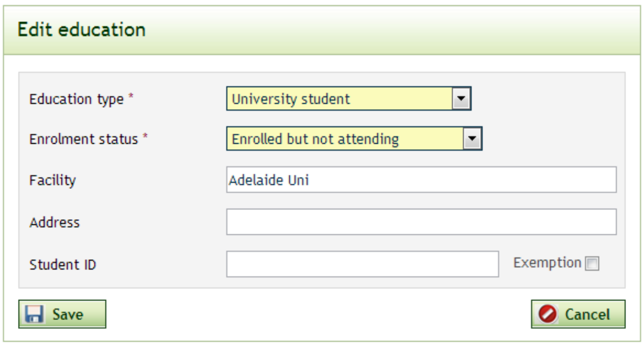
The Education panel

The education panel collects basic information about your client's education and training status at presentation to your agency (**P**) and one week before presentation (**WB**). If you select 'yes' that your client is undertaking formal education or training, the education details panel becomes available.

If no education details already exist for this client, click the *Add education* button within the panel. The 'add education' pop-up will then be displayed.

If education details already exist for this client, you can update them using the edit pencil icon as shown below.





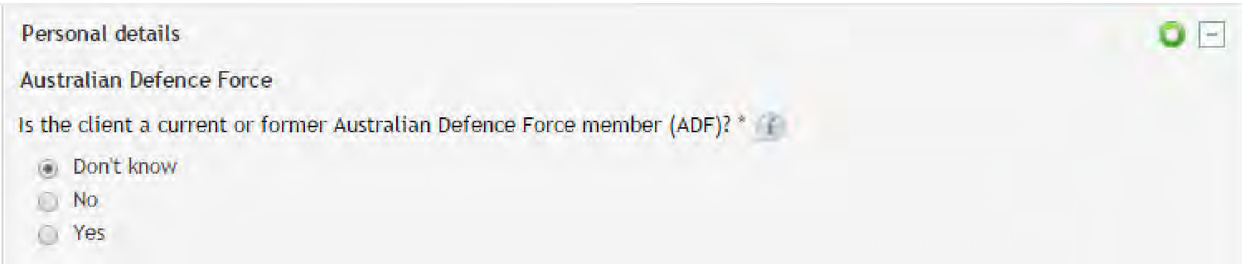
The 'edit education' pop-up allows you to change education type, enrolment status and provide details of the facility and client's student ID number. The education details table within the education panel will automatically update to the latest client information that you enter here once the *save* button has been clicked.

The Personal details panel

The personal details panel records information about Australian Defence force members (if the client is over 18 years of age), disabilities the client has, pregnancy (if previously selected), and care and protection orders (if the client is under 18 years of age).

Australian Defence Force

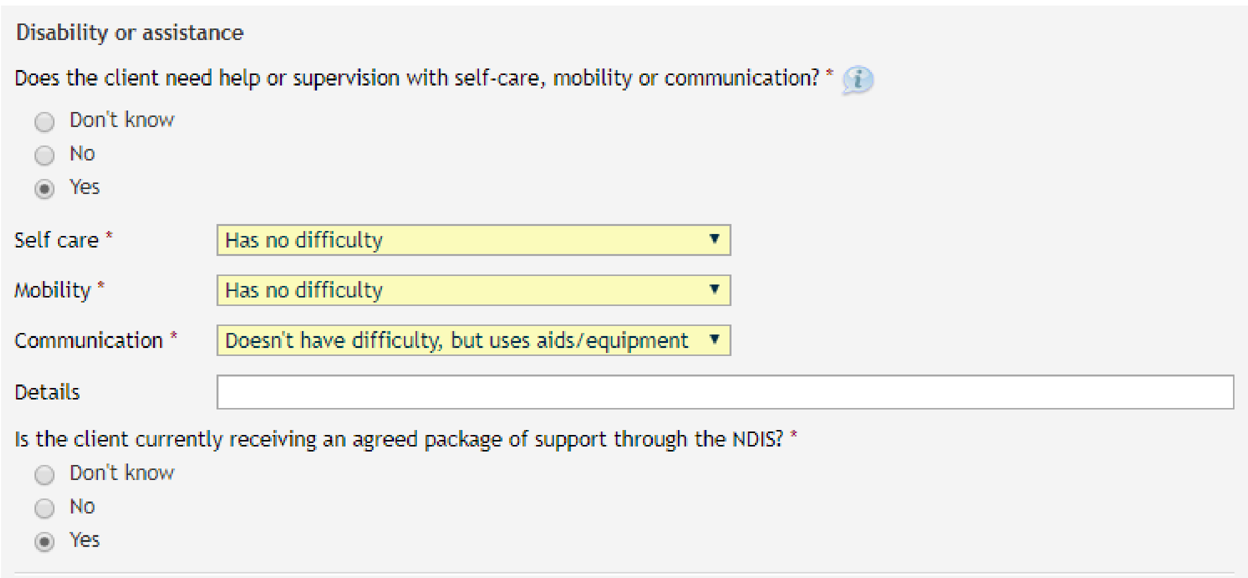
This panel relates to whether your client is a current or former Australian Defence Force member (ADF). This does not include non-Australian defence forces, or reservists who have never served full time in the ADF. Select a response of Yes, No, or don't know as applicable for your client.


Personal details
Australian Defence Force
Is the client a current or former Australian Defence Force member (ADF)? *
- (•) Don't know
- ( ) No
- ( ) Yes

Disability or Assistance

This panel relates to your clients' needs with self-care, mobility and communication, associated with a long-term health condition (e.g. severe asthma, depression), or a disability, that restricts everyday activities, and participation in the NDIS.

If you select 'yes' indicating your client has needs in one or more of these 3 areas, you will be required to select the level of difficulty your client experiences within each area.

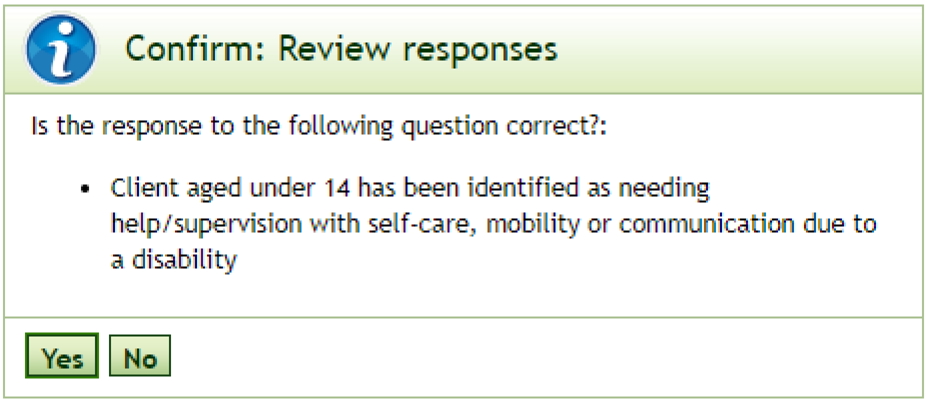

Disability or assistance
Does the client need help or supervision with self-care, mobility or communication? *
- ( ) Don't know
- ( ) No
- (•) Yes

Self care * Has no difficulty
Mobility * Has no difficulty
Communication * Doesn't have difficulty, but uses aids/equipment
Details

Is the client currently receiving an agreed package of support through the NDIS? *
- ( ) Don't know
- ( ) No
- (•) Yes

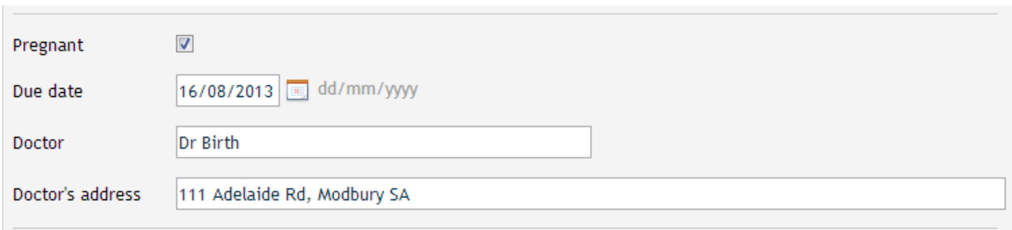
> ***Recording disability or assistance for children***
>
> *If the child is developing normally for their age (does not have a long term health condition or disabiltity), 'Has no difficulty' should be recorded for the three areas*

If you select that a client under 14 needs assistance in any of the three areas, you will be prompted when saving the panel to confirm the question has been answered correctly.



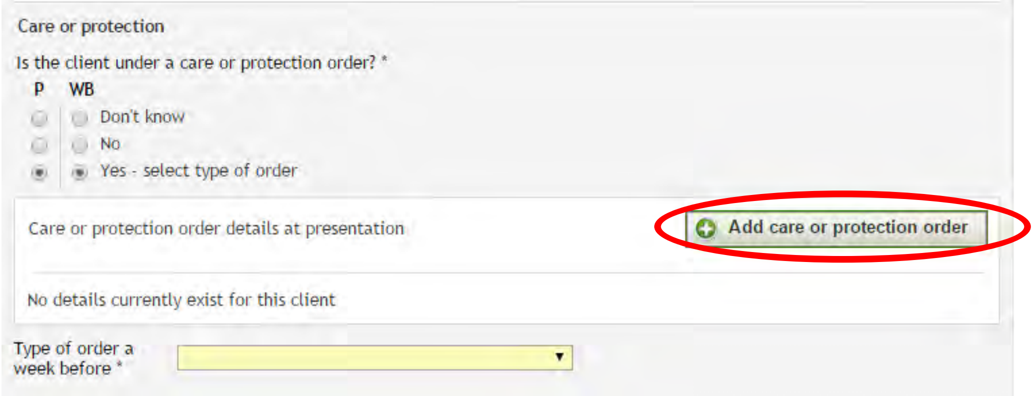
Pregnancy questions

If your client sex has been recorded as female or other-please specify, and you have indicated on the personal details page that your client is pregnant, a pregnant checkbox will appear. If ticked, it will open 3 questions about the client's pregnancy. *Note: the additional pregnancy fields are not mandatory.*

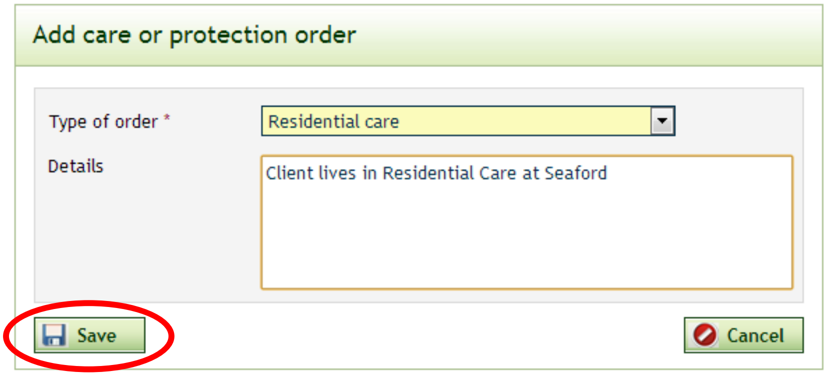


Care or protection order (under 18yrs only)

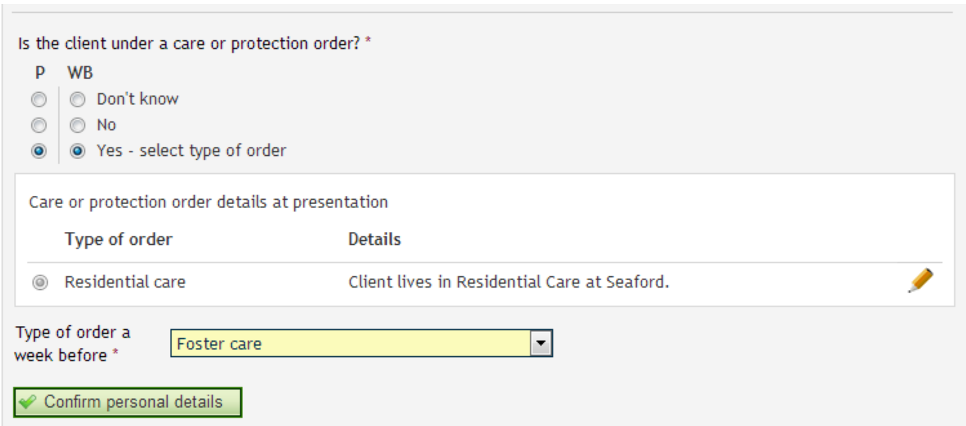
If your client is under the age of 18 you will need to record whether the client was under a care of protection order at presentation (P) and the week before (WB). If your client is under a care or protection order at presentation, click the *add care or protection order* button to enter details.



A pop-up box will now appear. From this box select the type of order from the drop-down menu; enter any appropriate details and press 'Save'. The details will now be displayed in the Care or protection order table.



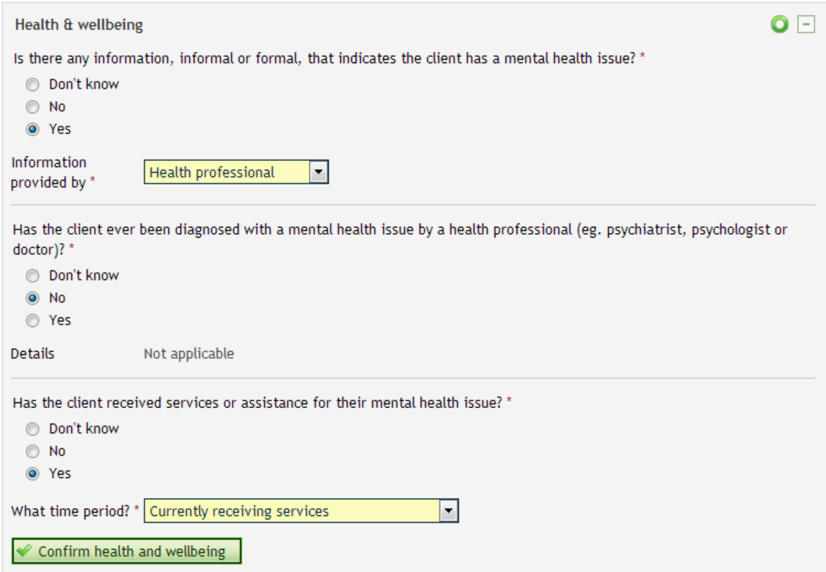
If you indicate the client was under a Care or protection order the week before presentation you will also need to indicate the type of order this was from the next drop-down menu.



The Health and wellbeing panel

The Health and wellbeing panel captures information in relation to your client's mental health.

If a 'yes' response is given to any of the 3 questions a corresponding question will be asked beneath.



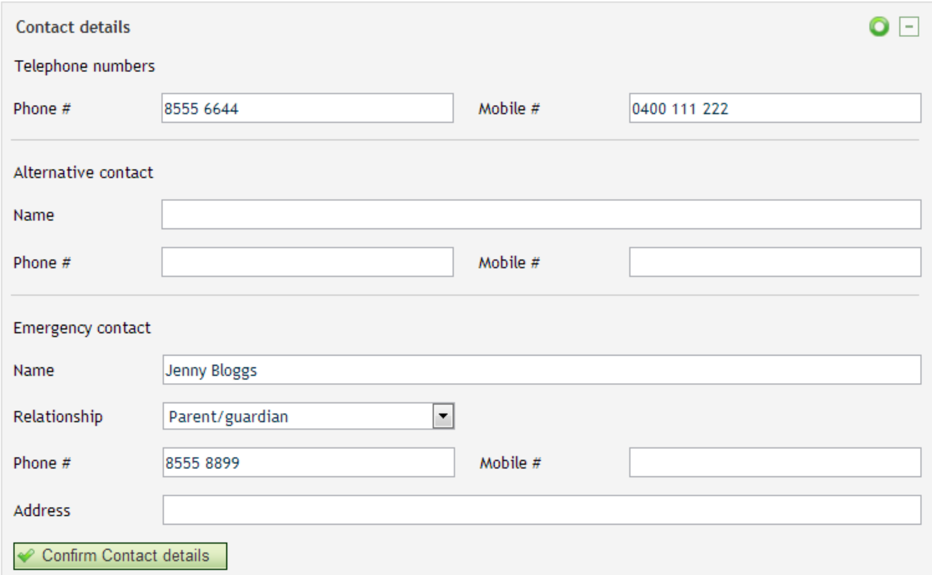
The first question in the mental health section, should be answered from your perspective as agency worker, and can be based on your observation of the client. Definitions for the response options are below;

'Information provided by' Definitions	
Agency worker	The client appears to the agency worker to have an undiagnosed mental health condition
Health professional	the client has been diagnosed with a mental health condition by a doctor, nurse, or other health professional
Non-government agency	information is received from a non-government agency who offers disability support programs, or from a local community support program, whose target population includes those with a mental illness
Self-identified	the client reports that they have a mental illness but does not have contact with a specialised mental health service or other relevant service providers currently
Other	there is information to indicate that the client has a mental health condition, but the source of information is not included in the list above
No information indicating mental illness	there is no information available to the agency worker to indicate that the client currently has a mental health condition.

Contact details Panel

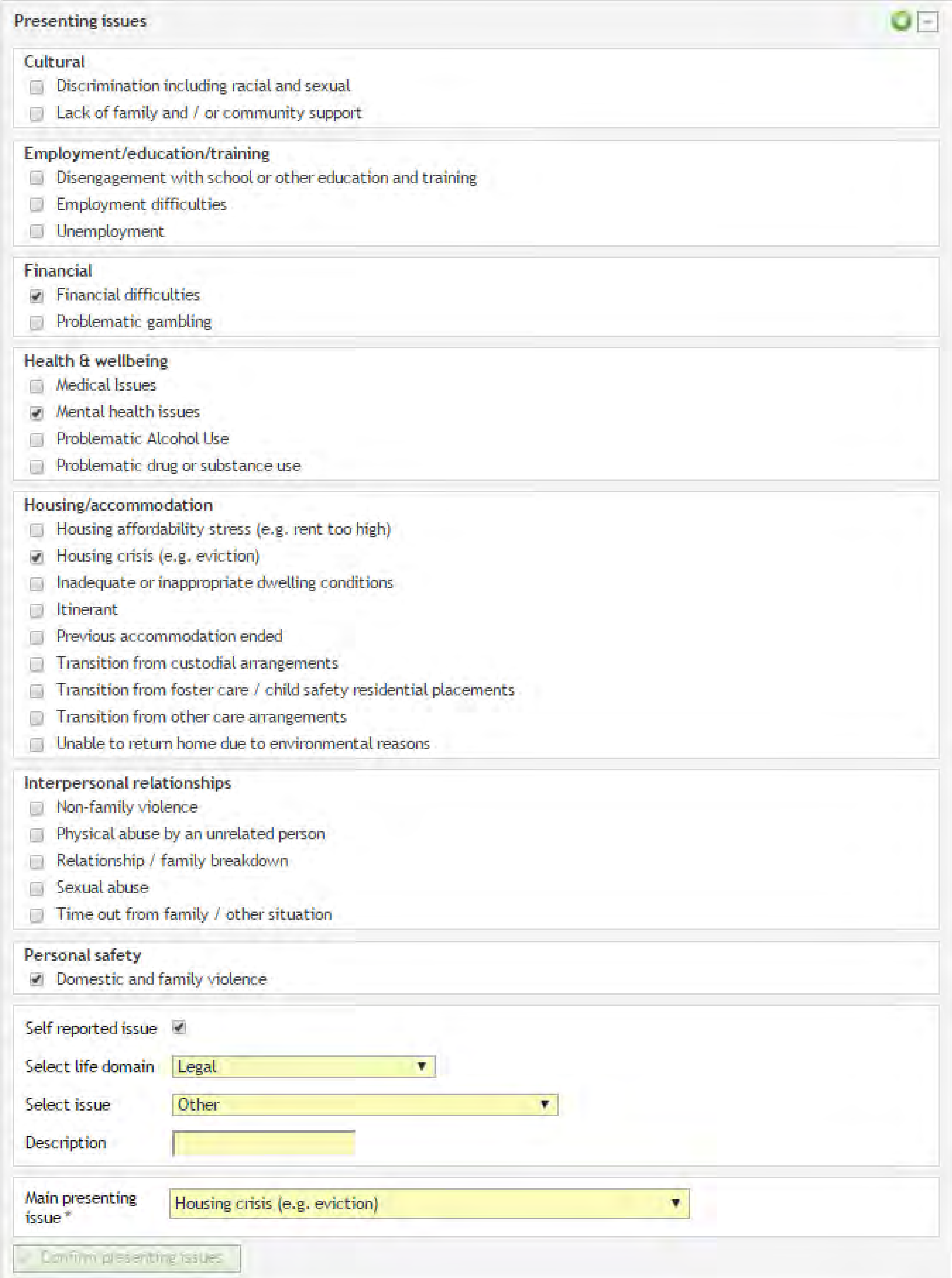
When entering the contact details panel within intake, it may already contain pre-filled information. Any information already contained on the client record – on the 'contact details' page in the client menu is carried across to this panel. Any contact details entered in the *add client* page are also carried though to here.

If you have any prefilled details entered on this page that are incorrect you can correct the information and press the *Confirm contact details* button.



Presenting issues panel

The final panel within the intake is the presenting issues panel. This is where you record the issues that the client presented with at your agency.


Presenting issues

Cultural
- [ ] Discrimination including racial and sexual
- [ ] Lack of family and / or community support

Employment/education/training
- [ ] Disengagement with school or other education and training
- [ ] Employment difficulties
- [ ] Unemployment

Financial
- [x] Financial difficulties
- [ ] Problematic gambling

Health & wellbeing
- [ ] Medical Issues
- [x] Mental health issues
- [ ] Problematic Alcohol Use
- [ ] Problematic drug or substance use

Housing/accommodation
- [ ] Housing affordability stress (e.g. rent too high)
- [x] Housing crisis (e.g. eviction)
- [ ] Inadequate or inappropriate dwelling conditions
- [ ] Itinerant
- [ ] Previous accommodation ended
- [ ] Transition from custodial arrangements
- [ ] Transition from foster care / child safety residential placements
- [ ] Transition from other care arrangements
- [ ] Unable to return home due to environmental reasons

Interpersonal relationships
- [ ] Non-family violence
- [ ] Physical abuse by an unrelated person
- [ ] Relationship / family breakdown
- [ ] Sexual abuse
- [ ] Time out from family / other situation

Personal safety
- [x] Domestic and family violence

Self reported issue [x]

Select life domain: Legal

Select issue: Other

Description:

Main presenting issue *: Housing crisis (e.g. eviction)

Confirm presenting issues

It is also possible to type in your own issue if it does not already exist in the defined list. To do this, tick the self reported issue box at the bottom of the panel and complete the drop downs as required.

Saving the intake - incomplete

At any stage during the intake process you can ‘Save incomplete’ by pressing the button on the bottom left of the page. This will save any already confirmed panels. To return to the intake later you will need to open the client record, click the *Intake* menu and select *cover page*. You will then be able to continue the intake.

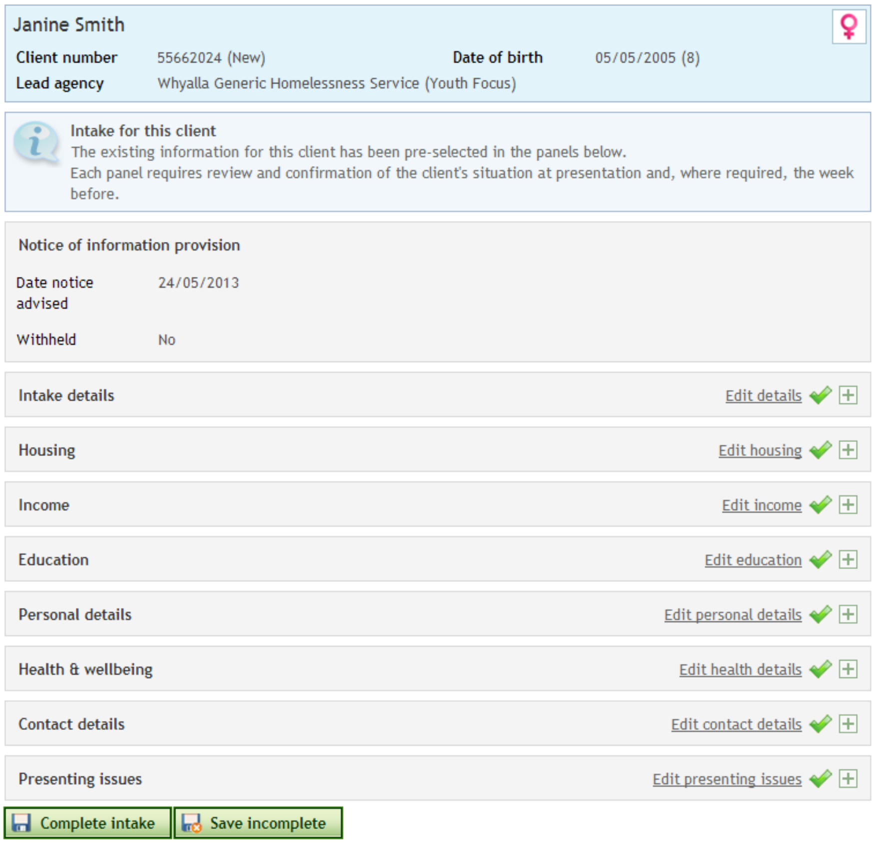
> ***note**:*
>
> *information in a saved incomplete intake will not be transferred back into the individual screens in the client menu. This will not occur until the intake has been saved and completed*

Completing the intake

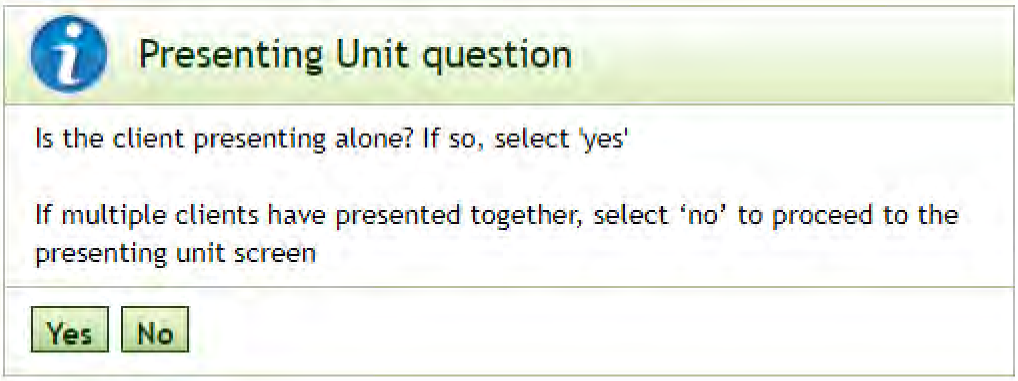
Once the intake is completed (each panel has been confirmed) the *Complete intake* button will be available. If the button is greyed out it is an indication that a section of the intake has not been completed correctly. If this is the case, review the intake panels to ensure they all have a green tick. Any panels that still show the green circle require attention.

Once an Intake is saved through the *Complete intake* button it cannot be edited. Please ensure the entered information is correct before finalising the intake.

Below: An intake that is completed, in view mode and with each panel collapsed. This intake is ready to be confirmed by clicking the ‘Complete intake’ button.



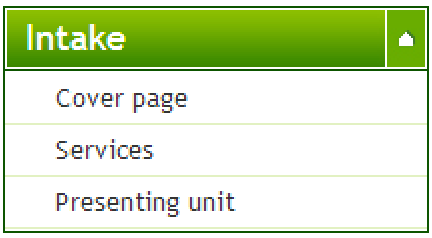
On completing the intake, a pop up will appear asking if the client is presenting alone or not.



Select the appropriate response.

If the client is presenting alone, you can skip to the Services section of this manual. If the client is part of a presenting unit, you will be directed to the presenting unit screen. Read on to the next section for instructions on Presenting units.

Once an Intake is completed on a client record the intake menu becomes available. The user can now navigate to the services page, the presenting unit page or view the details of the intake through the cover page.



If you will not be proceeding with assisting the client you can close the record using either the *add unassisted* or *end support* function at this stage.

Presenting Unit

The presenting unit function records the relationships between groups of people that present to your agency for assistance.

A presenting unit can be a family, a group of friends, siblings or a grandparent and his/her grandchildren.

> ***Example:***
>
> *Two friends who were house sharing together are evicted from their property and present together at your agency for assistance. These two friends would therefore be a presenting unit.*

AIHW Definition of a presenting unit

A presenting unit is a client or group of clients that present together to a specialist homelessness agency. People who do not receive a service, and are therefore not clients, are not included in the presenting unit. This may include children who present with a parent or guardian but do not receive any services themselves.

Presenting units may be:

- A person alone
- A person with child(ren)
- A couple with child(ren)
- A couple without child(ren)
- Siblings
- Multigenerational family members
- A group including unrelated persons

How to record a presenting unit

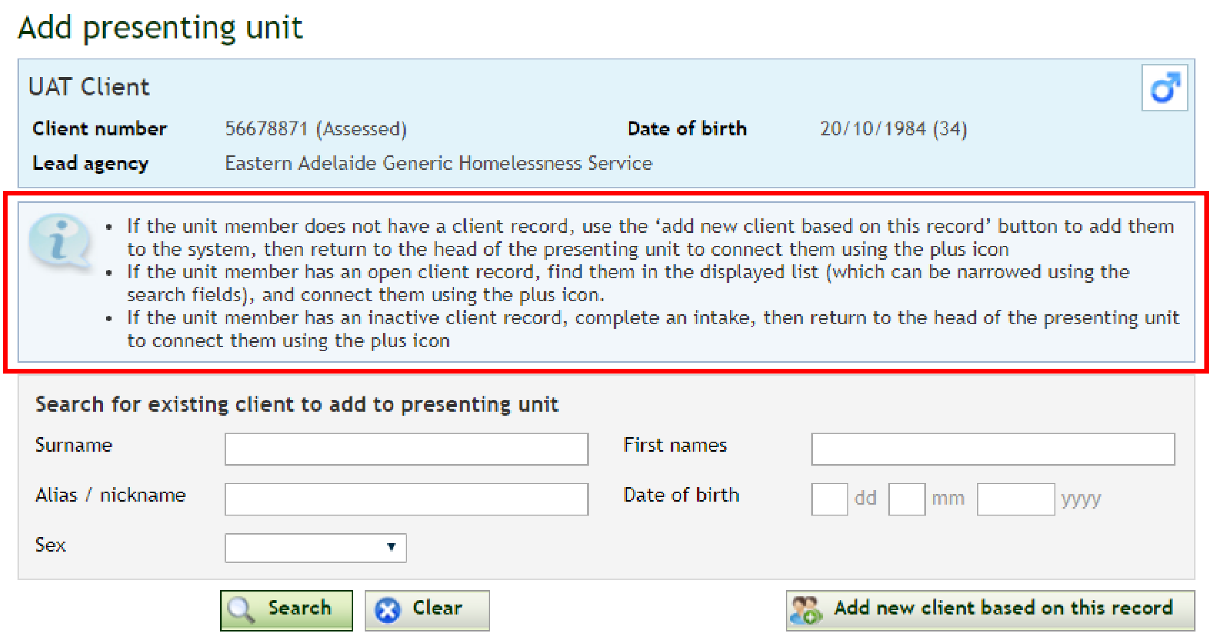
The presenting unit section is found within the Intake menu. It can only be accessed after an intake has been completed for all clients that will be members of the unit. If you have indicated during the intake that the client is not presenting alone, you will be directed to the presenting unit screen to assemble the unit.

Always assemble the unit from the record of the presenting unit head. The presenting unit head should be the spokesperson of the group, and should have the earliest, or same, start date as the other unit members.

> ***Note:***
>
> *Being the presenting unit head does not give one person a higher status above another; it is simply a way of recording the spokesperson of the group, and does not affect system functionality in any way*

To add a member to the presenting unit, enter their details into the search fields on the presenting unit screen, and select the search button, as shown in the screenshot below. A list of matches will then appear.

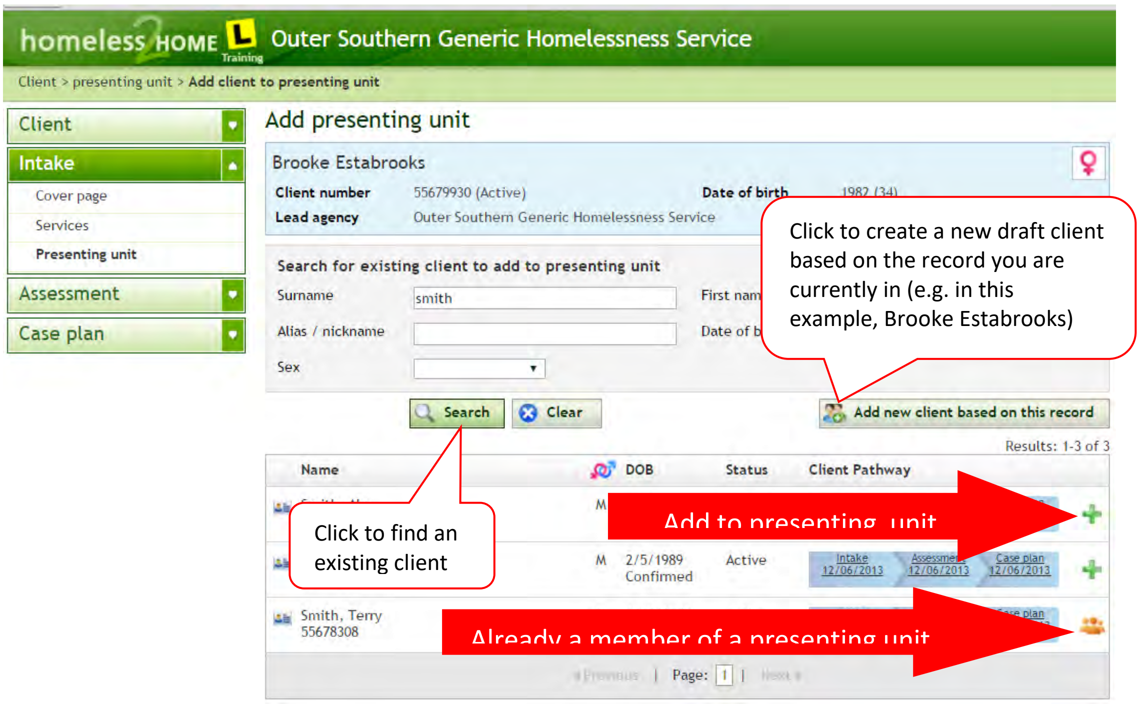
You can find instructions on putting the unit together in the info bubble at the top of the screen;



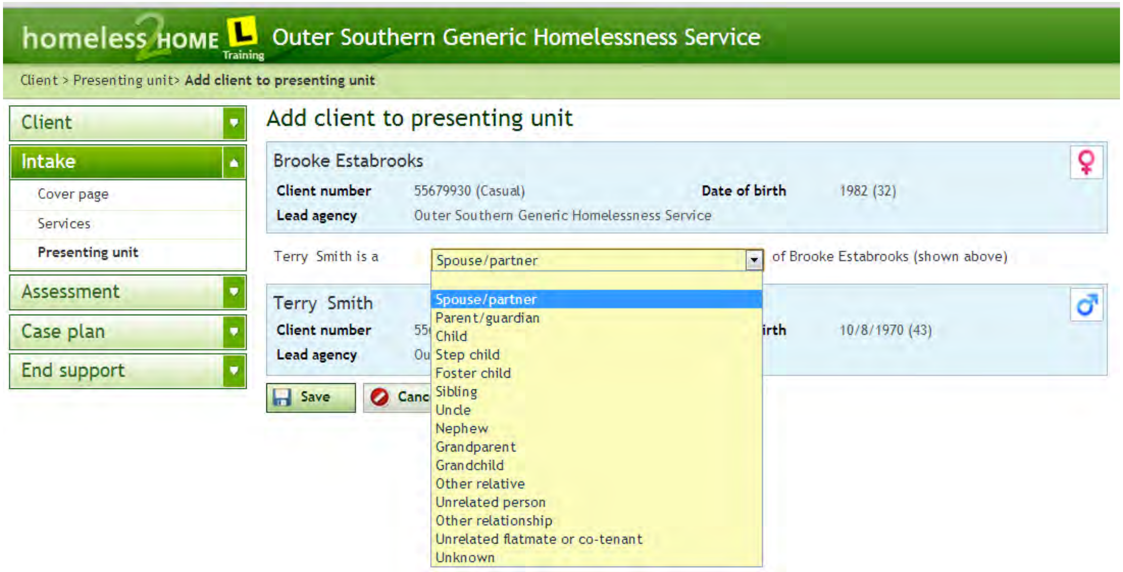
> ***Note:***
>
> *All clients to be added to the presenting unit must already have a current client record on H2H. The presenting unit function is a way of linking those records together. If the client you wish to add to the unit does not have an open record, follow the instructions in the info bubble on the presenting unit screen unit screen.*

In the list of search results, you will notice 2 icons. The orange 'people' icon indicates that that client is already part of a presenting unit and therefore cannot be added to this unit.

The green + icon is the ‘add client to presenting unit’ icon. Click this to add the client to the presenting unit.



Identify the record you want to add to the presenting unit, select the + ‘add client to presenting unit’ icon.



This screen shows both the presenting unit head and member records. The first record is the client record you are currently in and will become the presenting unit head. The second record is the client you are adding to the presenting unit. In between the two blue client record boxes is the relationships dropdown, from this menu choose the relationship between the two clients (as shown above).

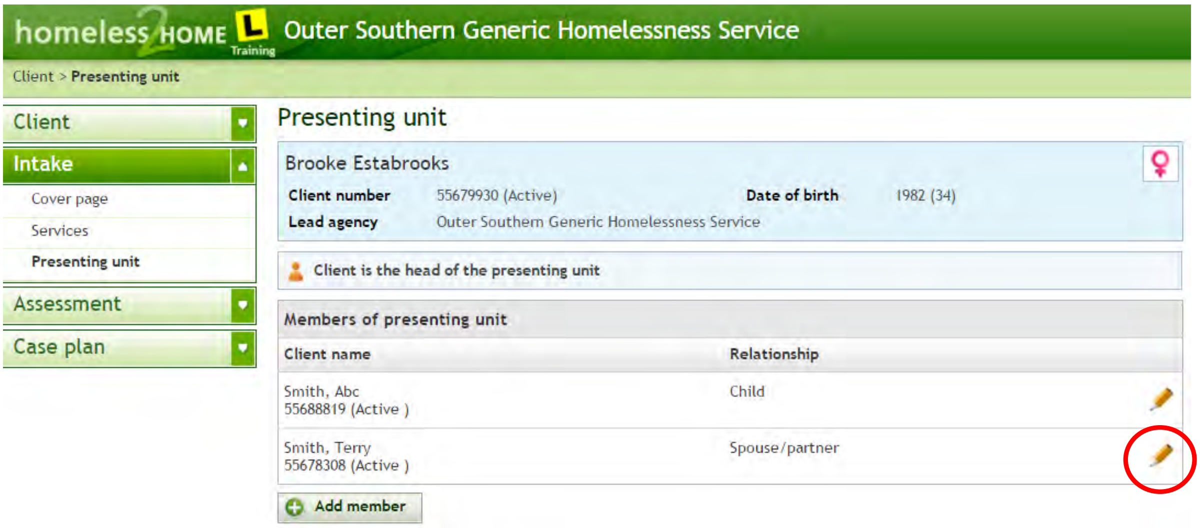
Select the relationship of the presenting unit member to the presenting unit head, click the *save* button. This returns you to the ‘presenting unit’ page that now lists the client you have just added.

From this screen you can add another member to the presenting unit, or edit/remove the member you just added by clicking the edit pencil.

Removing a presenting unit member

If you need to edit or removing members of a presenting unit, this can only be done from within the presenting unit head's record.

To remove members of the presenting unit, navigate to the 'presenting unit' page within the 'intake' menu. Click the edit pencil that corresponds to the client you want to remove. This takes you to the 'edit presenting unit' page.



You can change the relationship between the two clients by using the drop down or remove the member from the presenting unit by clicking the *remove member* button.

Intake Services

An intake service is a way of recording;

- The services and assistance your agency provided to a client
- Any services and assistance provided by another SHS or mainstream provider
- Any services and assistance the client needs, that cannot be provided or referred

Within H2H, there are two places where users can record services; within the Intake menu (service) or within the case plan. All assistance provided to a client prior to a case plan is entered as an Intake service, and all assistance provided to a client after a case plan has been opened is recorded as a case plan service.

When to add an Intake Service

An intake service should be recorded each time a client is provided with direct assistance, is assisted by another service provider, or an unmet need is identified.

It is important for H2H users to be mindful of what they enter as a service. To warrant a service being recorded, the client must have directly received something from your agency.

Examples of a provided service:

Jenny's worker drove her to a doctor's appointment - This is a provided service of Transport

Case Manager Belinda completed and sent off an application for housing for her client – This is a provided service of Advocacy/liaison on behalf of client

Examples of what does NOT constitute a provided service:

Client Jenny found her own way to her doctor's appointment

Case Manager Belinda drove to her client's house for a visit, but her client was not home

The AIHW requires the capture of information about all services, whether provided, referred or an unmet need for a client, and these services are broken into three categories;

- Housing and accommodation services
- General assistance and support
- Specialised services.

Those services and assistance listed in the 'housing/accommodation' and 'general assistance and support' categories can be provided by Specialist Homelessness Services. Some of the service types in the 'specialised services' category cannot be provided by an SHS, but are recorded through an external referral to a mainstream agency (e.g. Child Protection Services, Mental Health Services, etc.)

Services and Assistance List	
Housing/Accommodation	Assistance to sustain tenancy or prevent tenancy failure or eviction Assistance to prevent foreclosures or for mortgage arrears Short term or emergency accommodation Medium term/transitional Housing Long term Housing
General Assistance and Support	Advice/information Advocacy/liaison on behalf of client Assertive outreach for rough sleepers Assistance for domestic/family violence – perpetrator support services Assistance for domestic/family violence – victim support services Assistance for incest/sexual assault Assistance for trauma Assistance to obtain/maintain government allowance Assistance with challenging social/behavioural problems Child Care Child contact and residence arrangements Court Support Educational Assistance Employment Assistance Family/Relationship assistance Financial information Laundry/Shower facilities Legal information Living skills/personal development Material aid/brokerage Meals Other basic assistance Recreation Retrieval/storage/removal of personal belongings School liaison Structured play/skills development Training assistance Transport
Specialised Services	Assistance to connect culturally Child protection services Child specific specialist counselling services Counselling for problem gambling Culturally Specific Services Drug/alcohol counselling Family planning support Financial advice and counselling Health/Medical services Interpreter services Intellectual disability services

	Mental health services Other specialised services Parenting skills education Physical disability services Pregnancy Assistance Professional legal services Psychological services Psychiatric services Specialist counselling services

Not all SHS in South Australia are funded to deliver the same types of assistance. Some options will only be available to certain agencies for provision or referral, depending on funding arrangements and service agreements.

Definitions of each specific service in the list above can be found in detail in the AIHW - SHS collection manual accessible on the H2H support page.

> ***Please note****: A specific service type is not available to record 'assistance to obtain housing or accommodation' in the SHSC. This is because general assistance to obtain housing or accommodation is the fundamental role of all specialist homelessness services, so all agencies will be providing this service to all clients. Therefore it does not require a specific category on the list of services and assistance.*

The different delivery types of Services

Within H2H there are 3 different 'delivery types' available when recording a service. Services can be entered as:

Delivery Type Definitions	
Provided Service	• refers to a support service which is provided directly by your agency • All support provided should be recorded – even if the client does not acknowledge a need for services • Can be entered by either a lead or consented agency • You should only record that accommodation has been provided if you have provided the client with the actual accommodation e.g. agencies that have onsite crisis accommodation or medium term/transitional accommodation.
Referred service (within H2H or external to H2H)	Often a client needs a service that cannot be provided by your agency. In the instances where you have arranged for a service to be provided to your client by another agency, this is recorded as a Service Referral. Within H2H, you can record referrals to internal agencies (those

	agencies that use H2H), and external agencies (those agencies that do not use H2H). • You would enter a referred service if you refer a client to another service provider AND that service provider accepts the client for an appointment or interview • Do not complete a service referral if the client is NOT accepted for an appointment or interview. In that circumstance you would enter an unmet need (see below) • You only record that accommodation has been referred if you referred the client to another service provider to provide the actual accommodation
Unmet need	Used to record instances where a client needs a type of assistance that cannot be provided or referred. • This refers to any services or assistance you assess the client as needing, whether or not the client accepts or agrees to participate in this support service. • Even when a service cannot be provided, it is important to record the client's needs because this helps to identify unmet need.

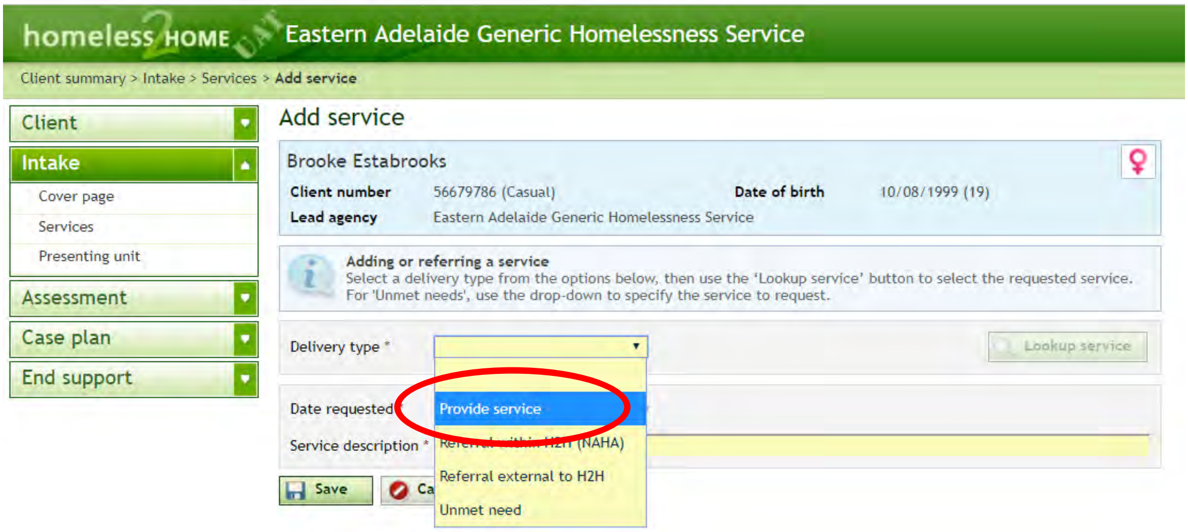
Provided Services

How to add a provided service

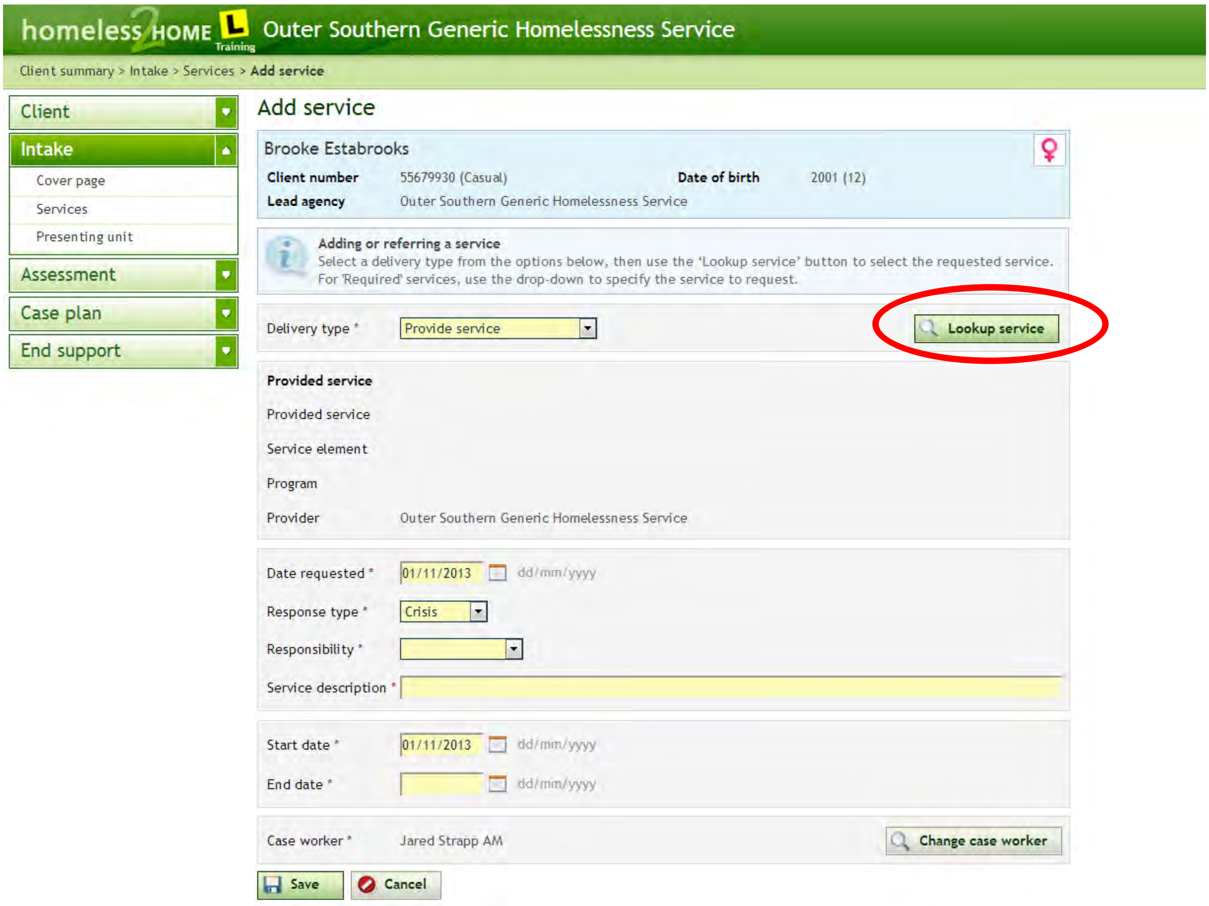
To record a provided service, follow these steps.

On the services screen within the intake menu, click the *add service* button (as shown below)

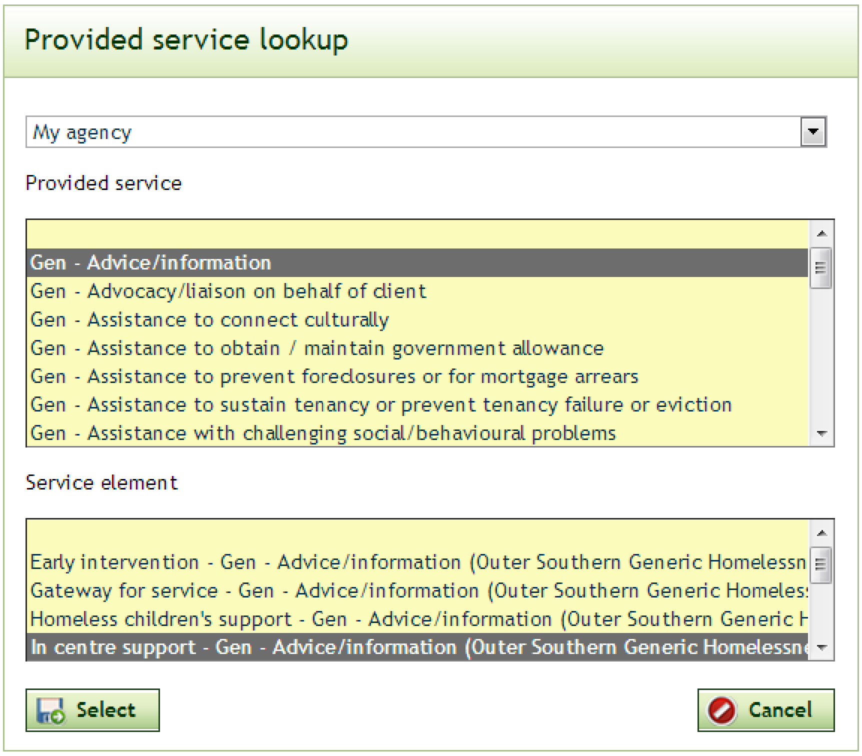
Select *Provide service* from the delivery type drop down box



The *Lookup service* button now becomes available, click the lookup service button.



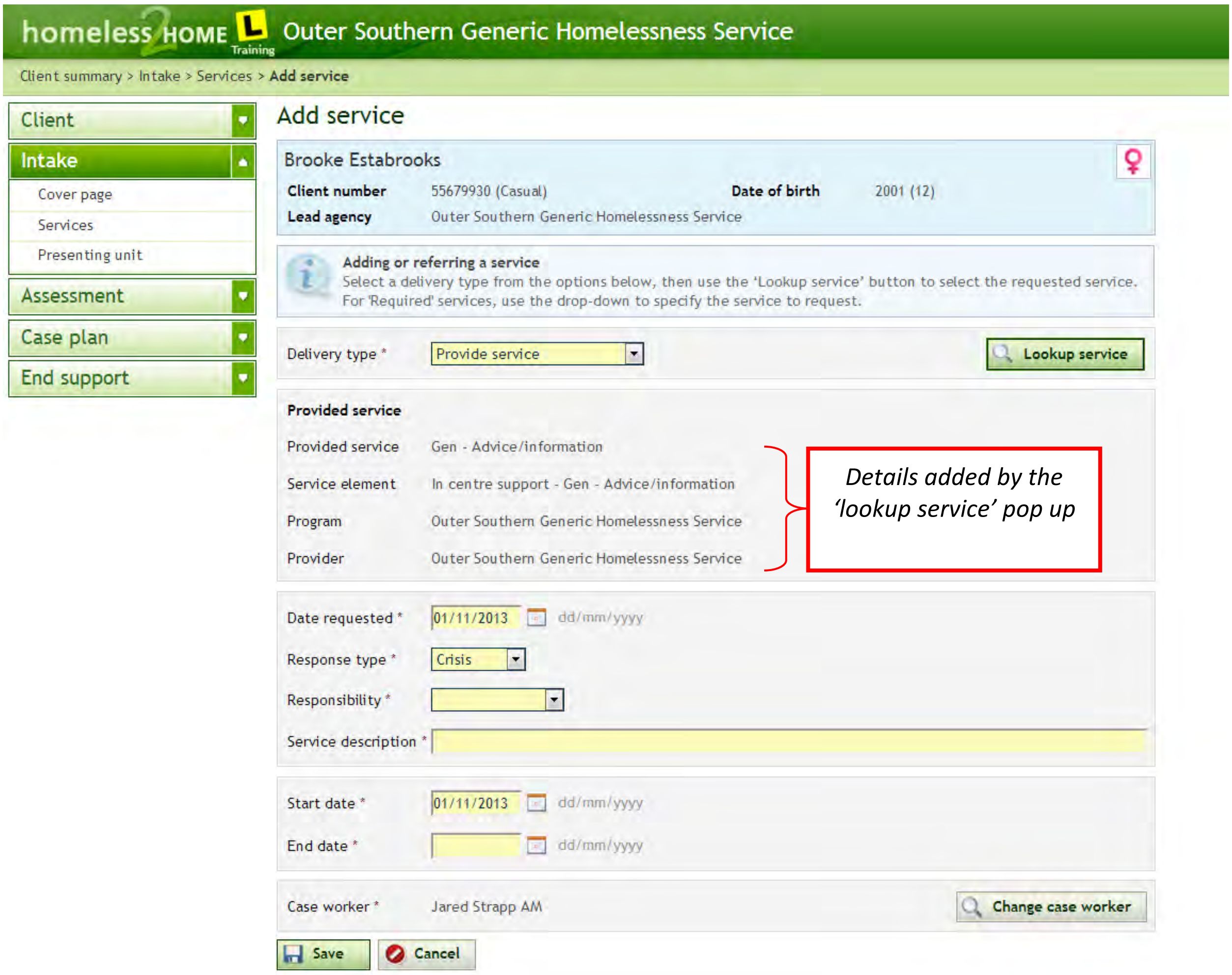
The 'provided service lookup' pop-up box now appears. Click on the relevant provided service, then the service element and click the *select* button (as shown on next page).



***Note**:*

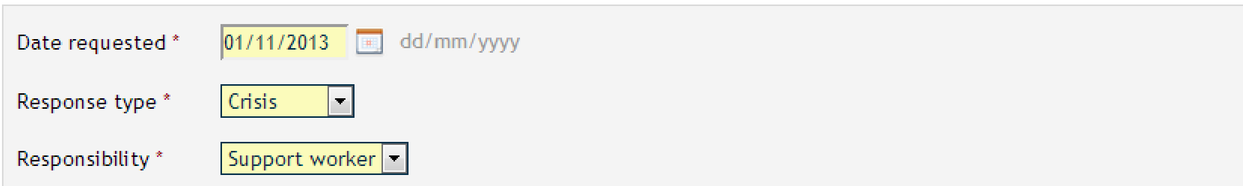
The list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency is part of an alliance. If you are unsure which service element to choose for the clients' particular circumstance, speak to your team leader or manager. You can find definitions for each service element at the end of this user guide.

This returns you to the 'Add service' screen with the details selected from the pop-up displayed in the 'provided service' section

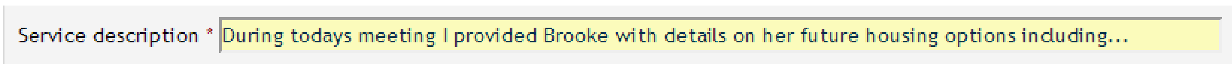


Next, you are required to enter;

- date that the client requested the service (this is pre-filled with today's date);
- Response type – Crisis or Non-crisis;
- Responsibility – client or support worker



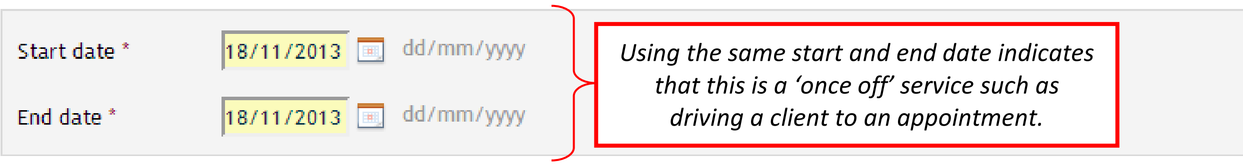
Now enter a service description. This field allows you to add the details of the provided service, as you may need to look back at this information in the future; so, it is a good idea to write specific information about the nature of the provided service.



Next select a start date and an end date for the service. Most provided services are delivered as one-off services, such as transport, advice, advocacy etc. these would start and end on the same day. Where a client is being provided with accommodation or is attending a set program, the end date would be the day that the accommodation/program ends.

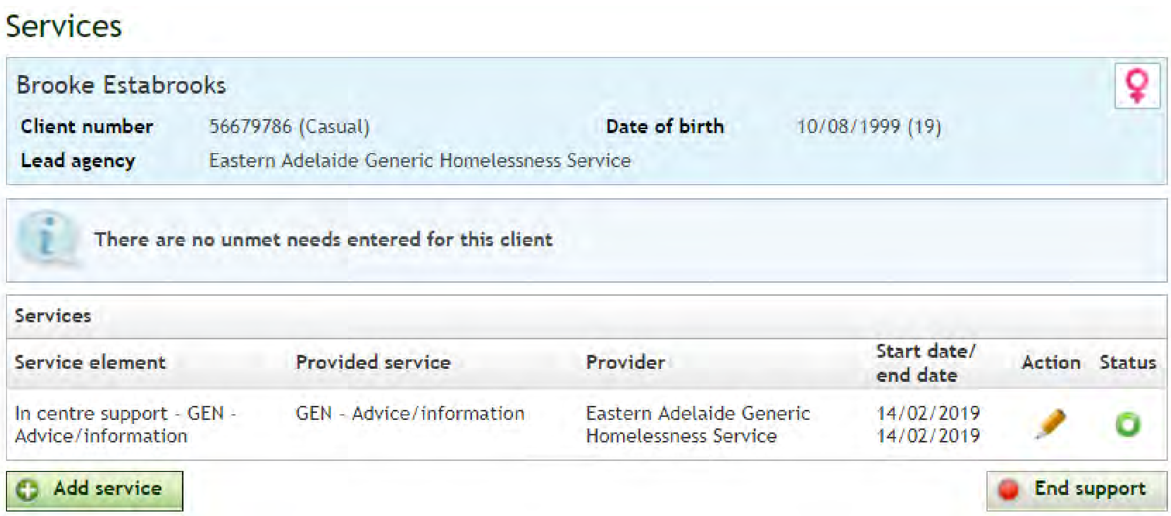
Example:

- You drive your client to her doctors appointment. The start and end dates in this instance would be the same day
- A client is being provided with transitional accommodation and has signed a 3 month lease with your organisation. In this example the start and end dates would match the dates of the lease term



Note: it is possible to edit end dates in instances where a client stops attending programs or exits accommodation. The next section explains how to edit a provided service.

Once you have completed all mandatory fields. Select the Save button to add the service. You are then returned to the Services screen where you can view the service you have just entered, and add further services.

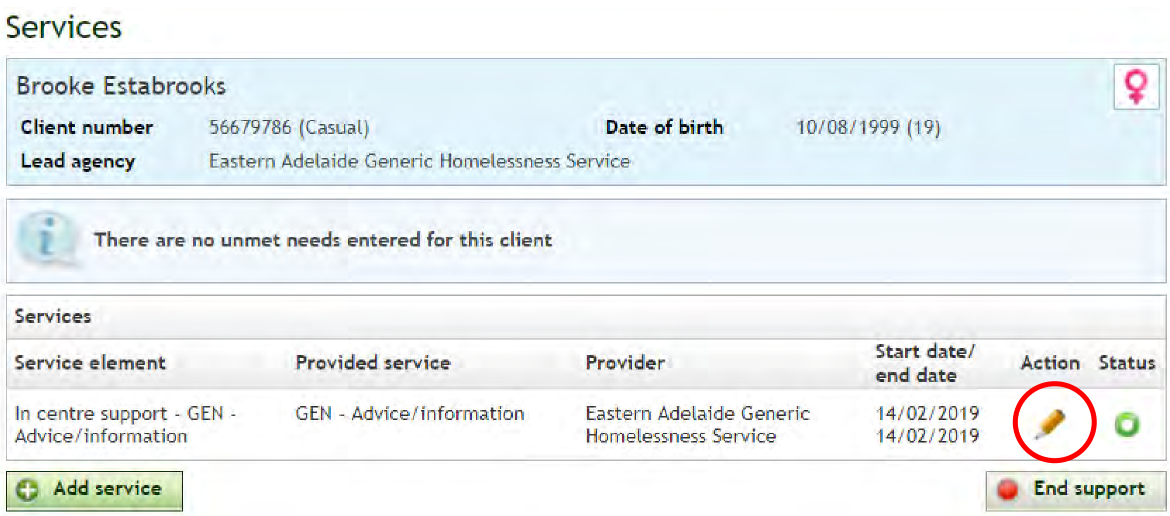


Editing a provided service

A service can be edited by clicking the edit pencil at the end of the relevant row. Only services which are open (the end date has not passed) can be edited. The only information that can be edited once a service has been saved is the following;

- Date requested
- Responsibilty
- Start date
- End date

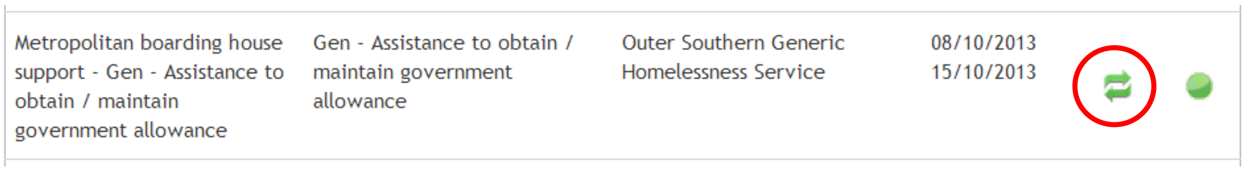
To edit, select the edit pencil icon as indicated below.



Once a service has passed its end date it can no longer be edited but can now be repeated.

Repeating a service

A service that is closed (the end date has passed) will display a repeat icon instead of an edit pencil.



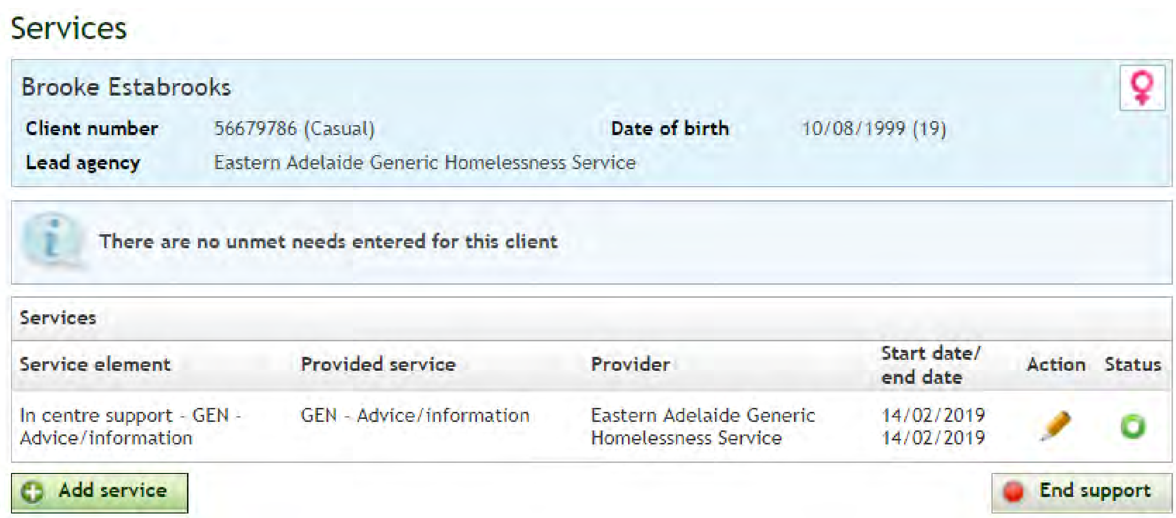
Repeating a service is a quick way to record the services that have been provided to your client more than once. Using this function pre-fills many of the fields that you would normally have to enter when adding a new service.

Example: You provided transport to take your client to a doctors appointment on Monday. On Wednesday your client requires transport again to a follow-up appointment.

Rather than entering a new service on Wednesday, you could click the repeat service button that corresponds to Mondays transport service.

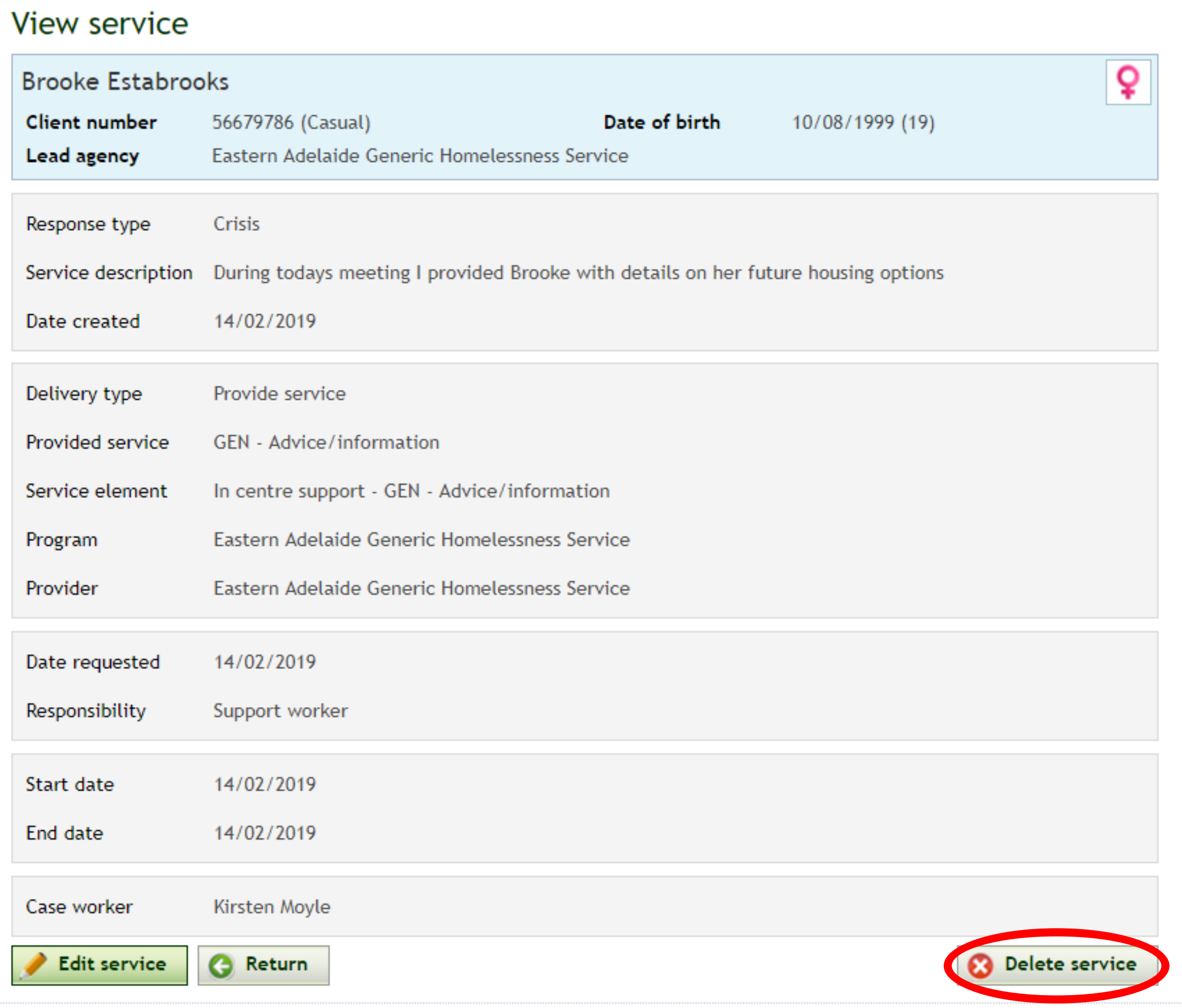
Deleting a provided service

Intake services can be deleted providing they are still open (the end date has not passed). To delete a service, you will need to locate the service on the Intake services page and click within the box of that service *(as shown below*



Upon clicking within the box, the ‘view service’ screen appears – *Note: this is different to the edit service page that would appear if you had clicked the edit pencil*

The *delete service* button is located at the bottom right of this screen.


View service

Brooke Estabrooks

Client number	56679786 (Casual)	**Date of birth**	10/08/1999 (19)
Lead agency	Eastern Adelaide Generic Homelessness Service		

Response type	Crisis
Service description	During todays meeting I provided Brooke with details on her future housing options
Date created	14/02/2019
Delivery type	Provide service
Provided service	GEN - Advice/information
Service element	In centre support - GEN - Advice/information
Program	Eastern Adelaide Generic Homelessness Service
Provider	Eastern Adelaide Generic Homelessness Service
Date requested	14/02/2019
Responsibility	Support worker
Start date	14/02/2019
End date	14/02/2019
Case worker	Kirsten Moyle

Edit service Return Delete service

Referred services

A service referral in H2H is recorded in a similar way to a provided service. You would use the service referral function in instances where a service has been provided to your client, but not provided by your agency.

There are two types of service referrals within H2H. They are:

1. Referral within H2H (NAHA) – to be used when referring to an agency that uses H2H (e.g. other Specialist Homelessness and Domestic Violence Services)

2. Referral external to H2H – to be used when referring to an agency who does not use H2H (e.g. mainstream services such as health, employment services, etc)

All referrals in H2H, including service referrals should be completed as a 'warm referral', meaning that prior to sending the referral on H2H, you have contacted the agency you are referring to, discussed the referral and ensured it is appropriate before sending.

Referrals within H2H (internal referrals)

Internal referrals are used to record where the client has been/or is going to be provided with assistance by another SHS.

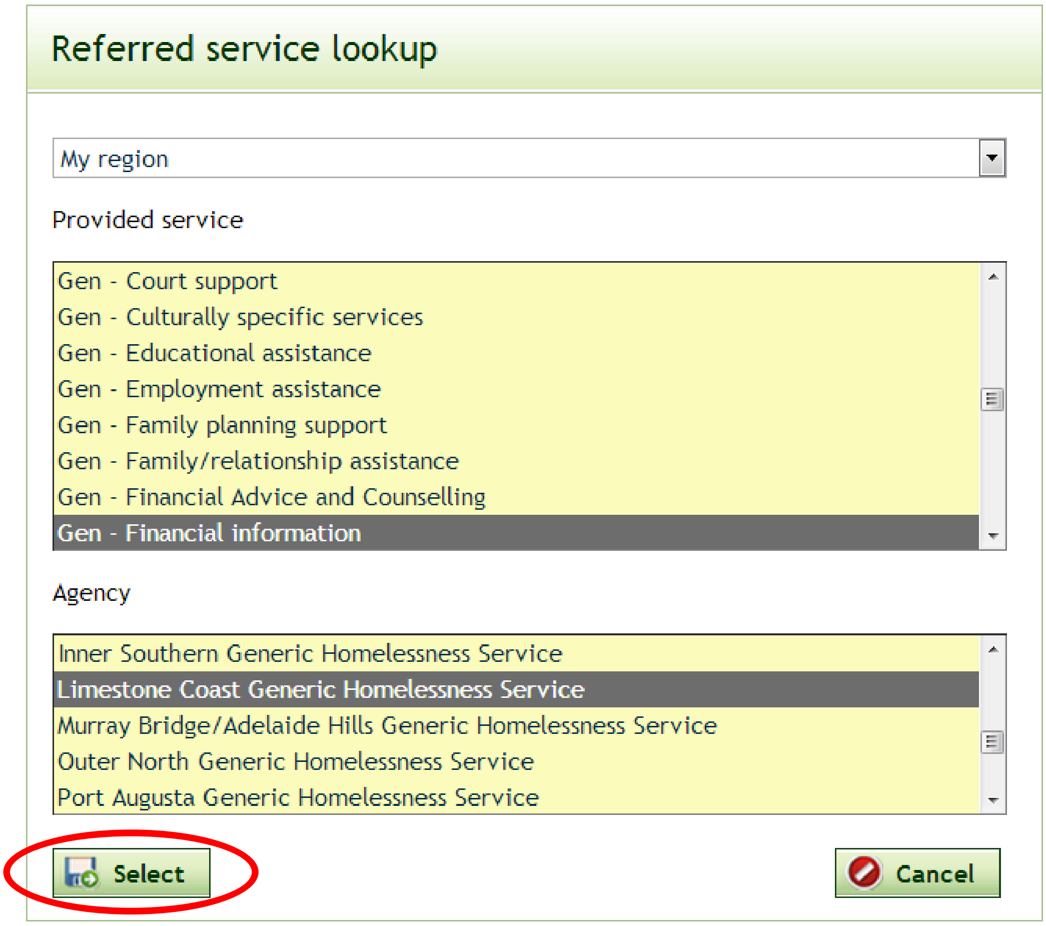
How to add an internal referral

After selecting the 'Referral within H2H' option from the delivery type drop down box, press the *Lookup service* button.

The 'Referred service lookup' pop-up box will then appear. Select the service you have referred or are referring.

> ***Note:***
>
> Ensure you select the correct prefix for the agency you are referring to; e.g. if you are referring your client to another generic service you would select the 'Gen' prefix. If you were referring a client to a domestic violence service for counselling, you would select the 'DV' prefix.

Next, select the agency from the list available in the lower box and press the *select* button.



***Note**:*

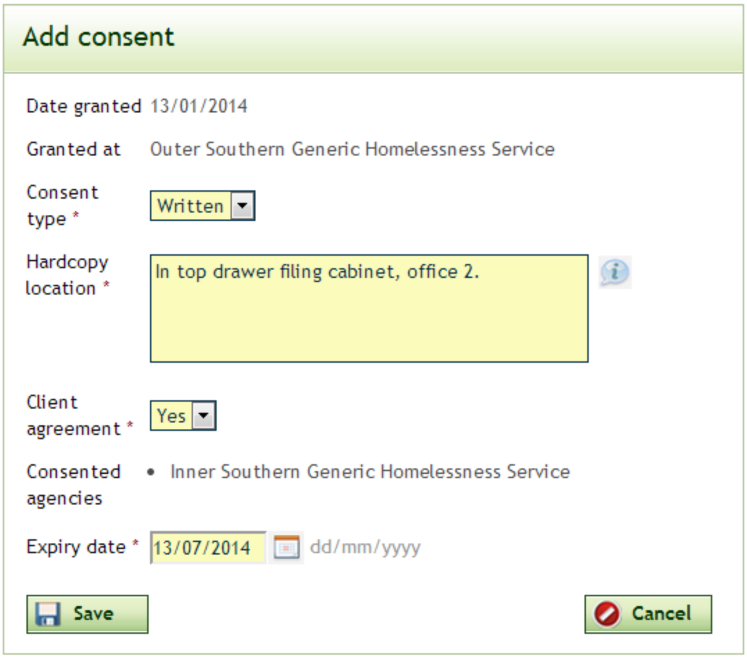
If referring to an agency outside of your region (i.e your agency operates in the southern metro but you are referring a client for a service in the western metro), you will need to change the 'my region' drop down to 'all'.

Having selected your responses from the pop-up box you will be returned to the 'Add service' screen where you will need to enter:

- The Reason for referral
- The name and contact details of the agency that you are referring to
- The response type, responsibility and description of the service
- The requested, start and end dates of the referral

To be able to send the referral the client must provide consent to the referring agency. To add consent, click the *Add consent* button located in the blue panel at the bottom of the screen.

The following ‘Add consent’ pop-up box appears:



Select the consent as written or verbal. If written is selected, you will need to record where the hardcopy is located. Next select if the client has agreed.

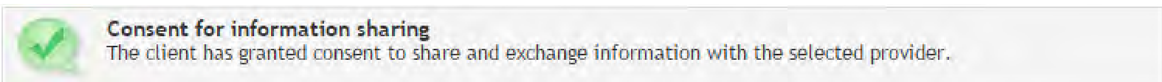
If the client record you are adding a service to is a child, the add consent will appear slightly differently. Please refer to the consents section for guidance if needed.

> ***Note**:*
>
> *A client does not necessarily always need to agree to the consent. This may include instances where information sharing is necessary for legal reasons as outlined in the notice of information provision.*

Lastly enter an expiry date for the consent. The expiry date is automatically defaulted to 6 months from todays date, however this can be altered.

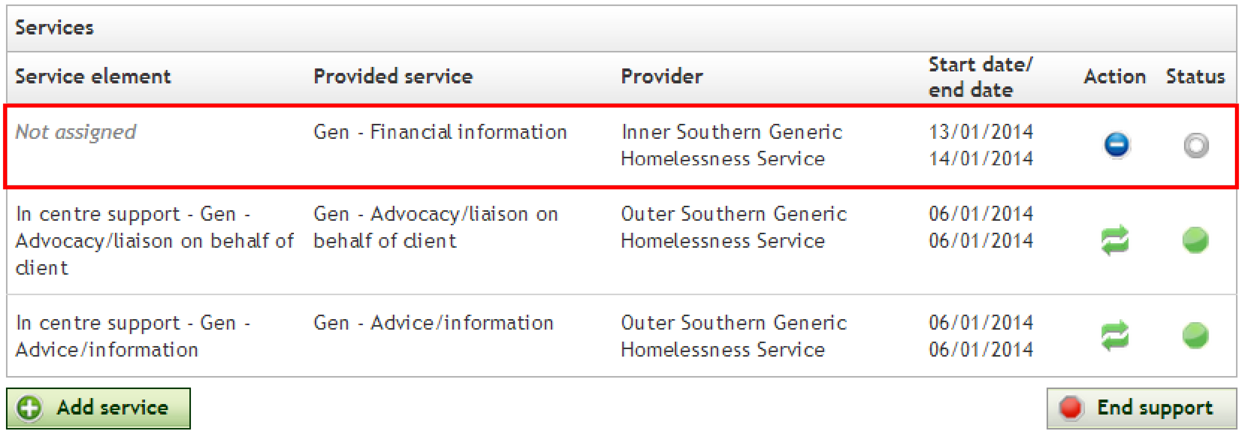
Once you have completed this screen press the *Save* button.

You are then returned to the ‘Add service’ screen. Check that a green tick now appears in the consent box at the bottom of the page;



You can now select the 

button. Once selected you will be returned to the services screen and see the referral you just sent in the list of services (as shown below).



Service element	Provided service	Provider	Start date/ end date	Action	Status
Not assigned	Gen - Financial information	Inner Southern Generic Homelessness Service	13/01/2014 14/01/2014		
In centre support - Gen - Advocacy/liaison on behalf of client	Gen - Advocacy/liaison on behalf of client	Outer Southern Generic Homelessness Service	06/01/2014 06/01/2014		
In centre support - Gen - Advice/information	Gen - Advice/information	Outer Southern Generic Homelessness Service	06/01/2014 06/01/2014		

A referral shown within the services list will initially appear slightly different to provided services.

In the 'action' column the blue *withdraw* button can be seen. The service element column displays "*not assigned*" as the service element is selected by the provider when the referral is accepted. Currently this referral is still 'pending' meaning it has not yet been accepted by the other agency.

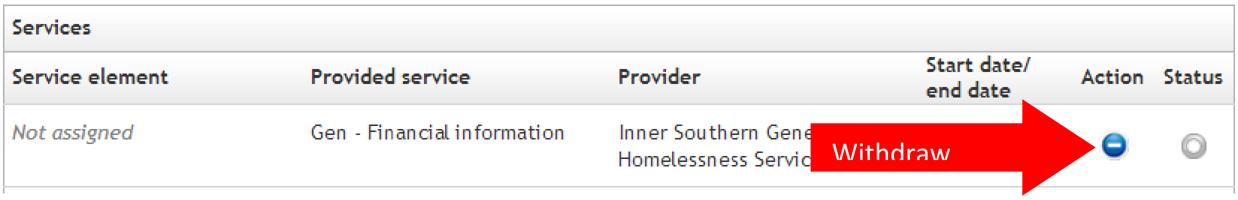
For information on how to accept a service referral please see the Agency manager functions section

Withdrawing internal referrals

An internal referral can be withdrawn at any point before the referral is accepted. Once the referral is accepted, the receiving agency selects a service element, assigns a case worker, and the *withdraw* button disappears.

To withdraw a referral select the withdraw button as indicated below.

Referrals external to H2H cannot be withdrawn as they are accepted automatically once sent.



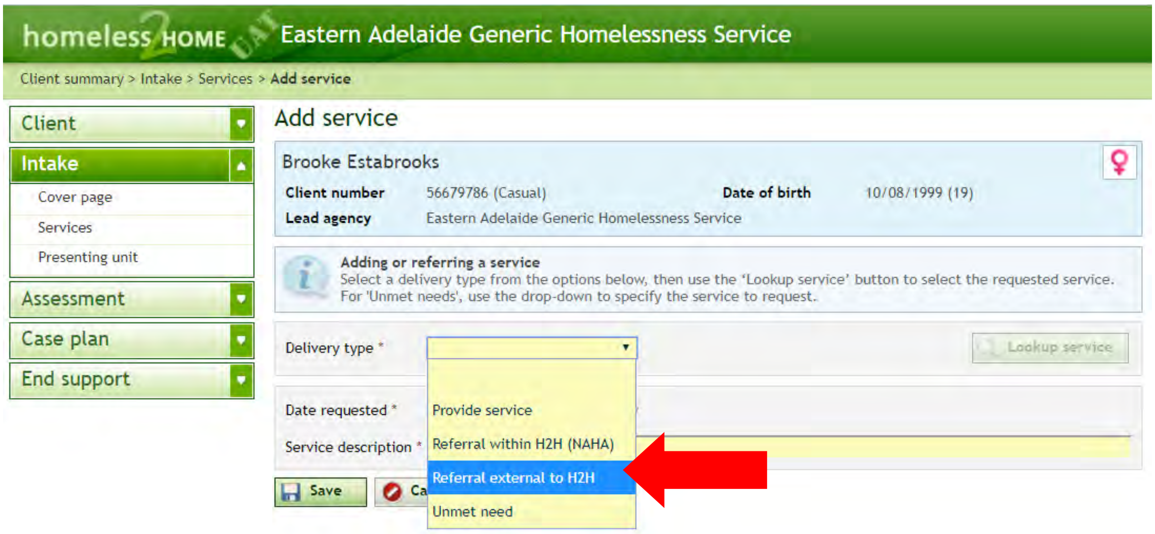
Service element	Provided service	Provider	Start date/ end date	Action	Status
Not assigned	Gen - Financial information	Inner Southern Gene Homelessness Servic			

Referrals external to H2H

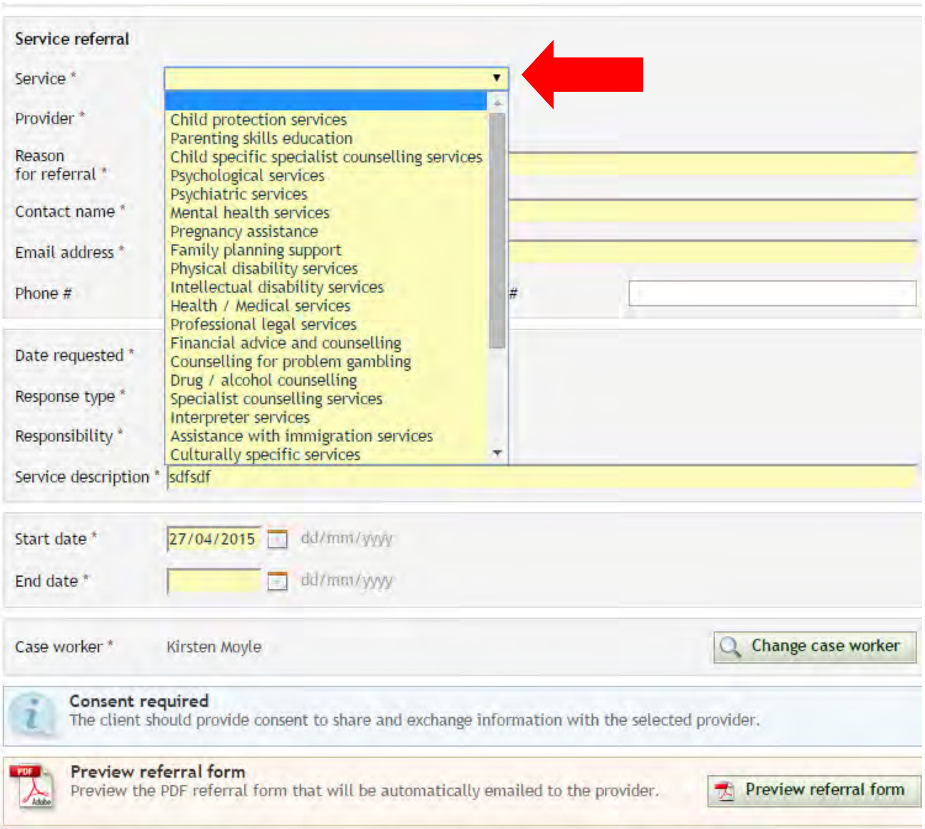
External referrals are used to record where the client receives assistance from an agency that does not use H2H (e.g. mainstream services such as health, employment services, etc.)

How to add an external referral

Select 'Referral external to H2H' from the delivery type drop down box.

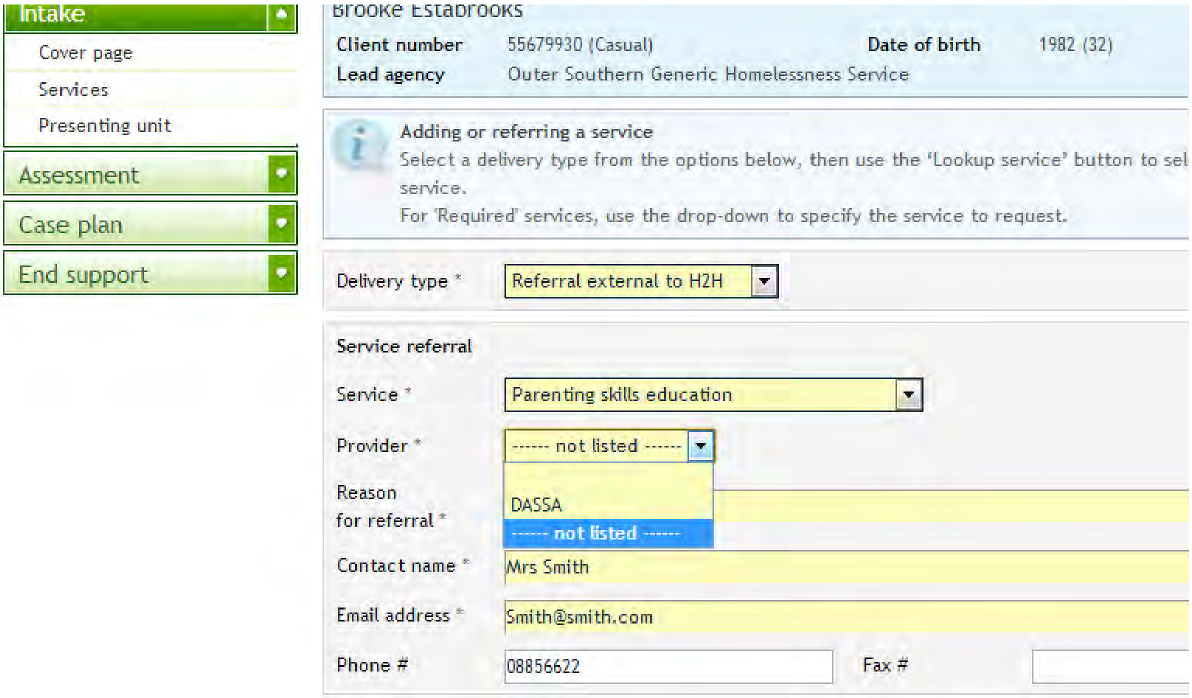


Select an option from the ‘Service’ drop down box.



The next field is the ‘Provider’ field. If the agency you are referring to is listed choose the correct option, if not choose the ‘-------not listed-------‘option.

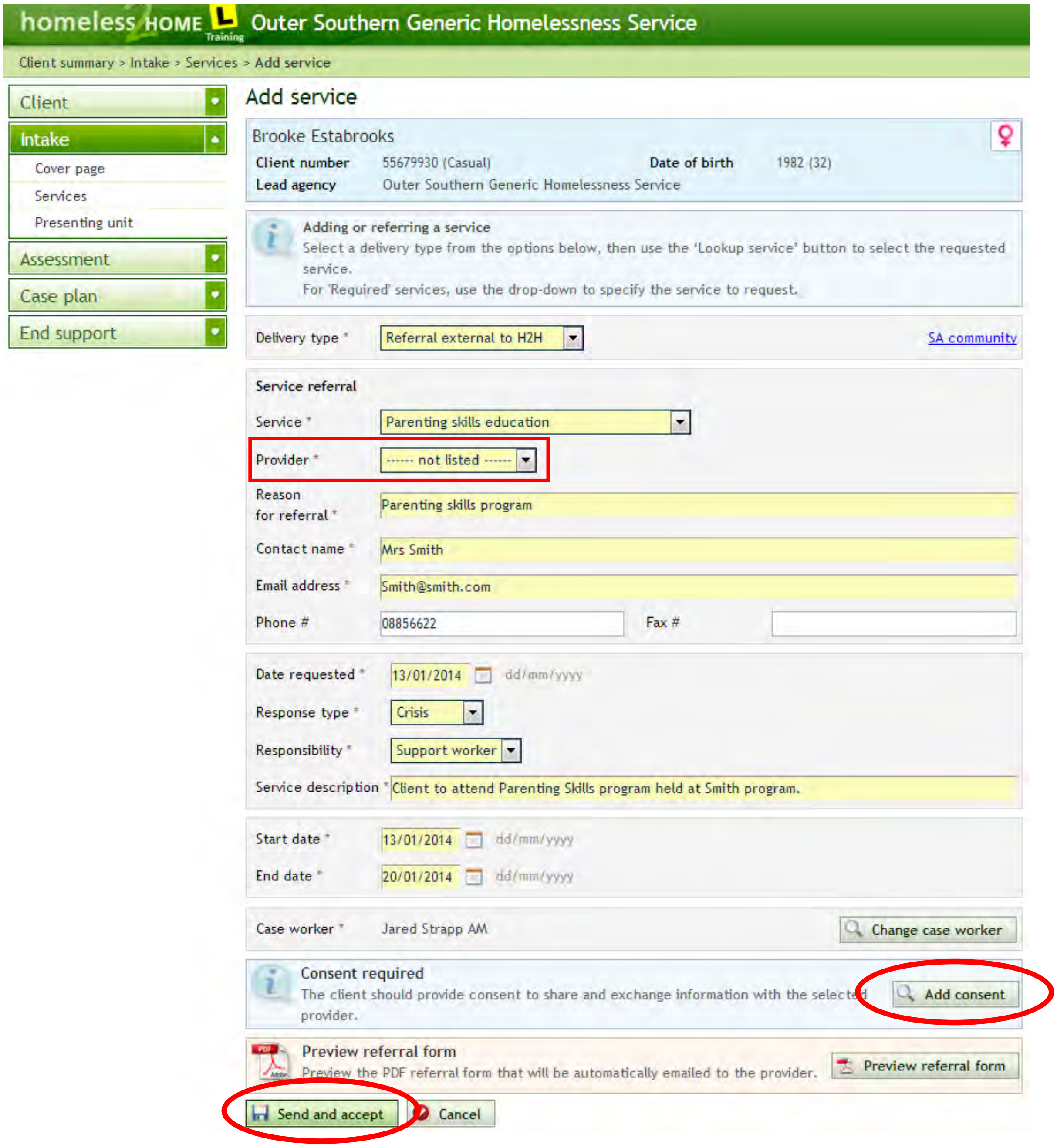
> ***Note**:*
>
> *This list contains previous referred agencies. If you have not sent any referrals yet for this client, then no list will appear.*



Complete the 'reason for referral' section and enter the contact details of agency/worker you are referring too.

Complete the responsibility, service description and the requested, start and end date fields.

If the 'provider' field is 'not listed' you will need to add a consent before you send the referral. Click the *Add consent* button at the bottom of the screen and complete the pop-up (see consents for more information).



Once consent is added the referral is now ready to send. You will notice the send button says, 'Send and accept' rather than just 'send'. This is because you are sending an external referral to an agency that does not use H2H and therefore has no way of accepting the referral within the H2H system. By pressing the *send and accept* button you are acknowledging that the provider has already assisted, or as has agreed to assist the client.

Unmet Need

You can also record services that a client may need but cannot be provided. This is referred to as an Unmet Need. If the need can later be met, it can be converted to either a provided or a referred service (see the converting an unmet need section for more detail)

When to record an unmet need

An unmet need should be entered when it is identified that a client may need a particular service, but that service cannot be provided, this can be due to the service being unavailable or the client not accepting an offered service.

Even when a service cannot be provided, it is important to record the client's needs because this helps to identify unmet need.

Example 1:

It has been identified that a client needs financial counselling but the only agency that provides this service is currently not taking any new appointments as they have a 3 month waiting list.

In the example above, you would enter an unmet need of financial counselling, by following the steps in the next section.

Example 2*:*

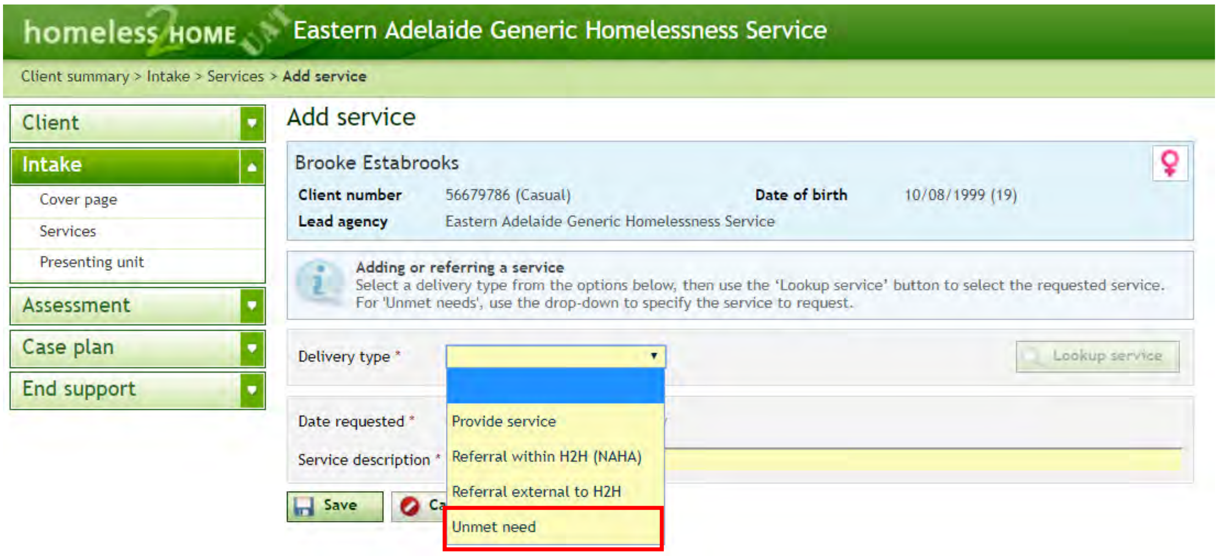
A single mother presents with her children having been evicted. They are provided with short term accommodation in a motel. They have an unmet need for medium term/transitional accommodation that cannot be provided as there are no vacancies available. The worker records an unmet need of medium term/transitional accommodation for each family member, as they are unable to meet this need for the clients.

Entering an unmet need highlights a gap in service provision and assists in identifying trends for clients.

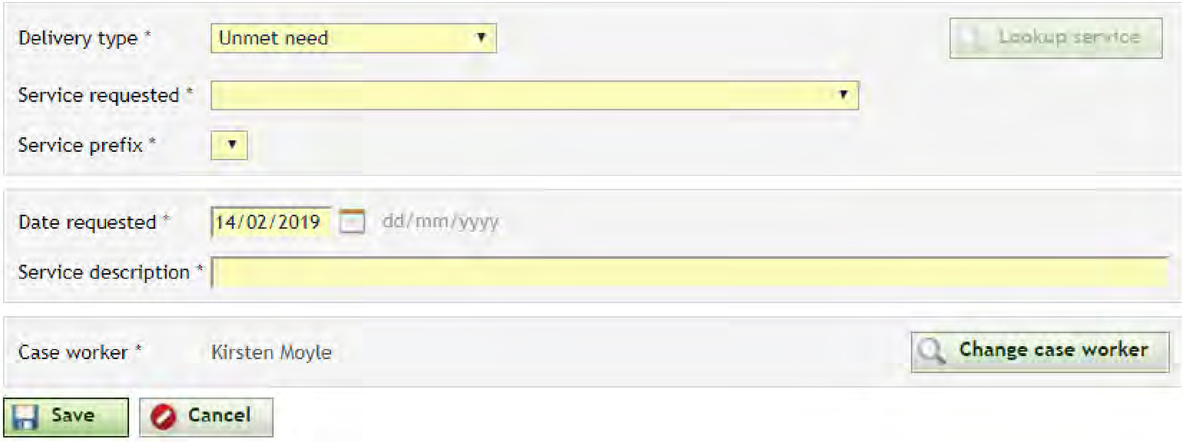
How to record an unmet need

To record an unmet need, start the same way you would add any other service, by clicking the *add service* button on the services page.

Within the 'Delivery type' drop down box select the *unmet need* option.



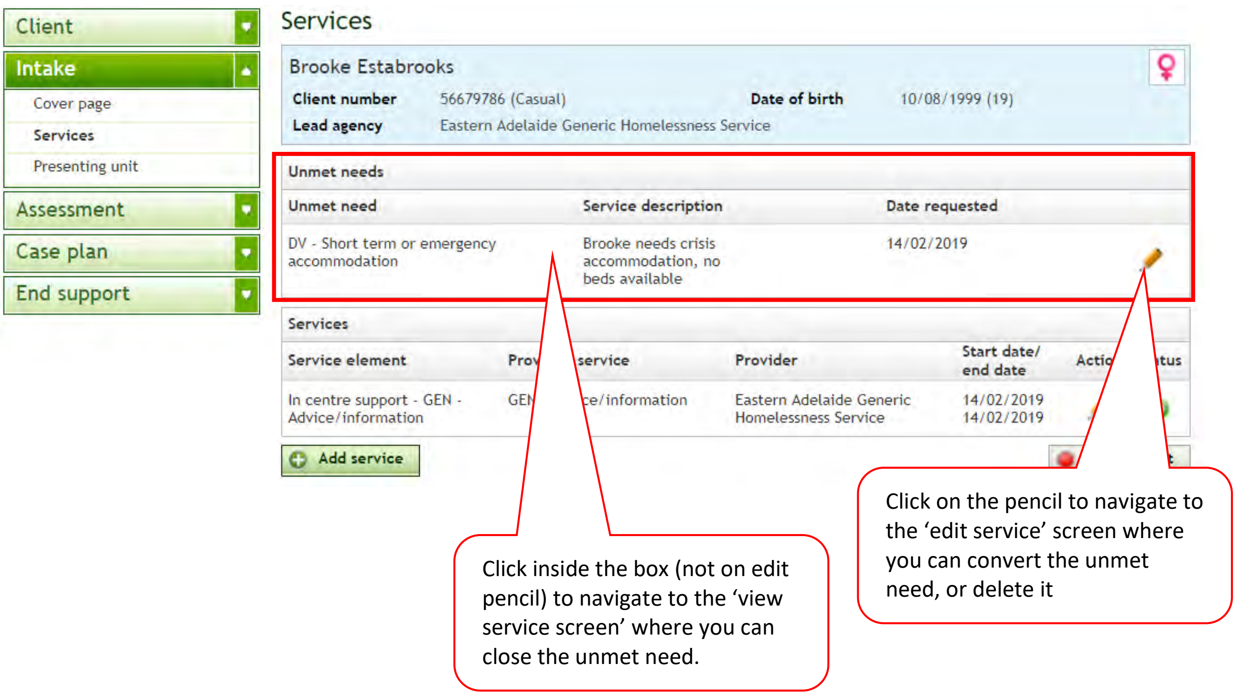
You will need to select the unmet need for the client, followed by the prefix. If the unmet need is for a service that your agency will eventually provide, select the prefix that matches your agency target group. If another SHS or an external provider will be providing the service in the future, select their corresponding prefix.



Example: if your client has just fled a Domestic Violence relationship, and requires emergeny accommodation but none is available, you may choose to enter an unmet need of **Short term/emergency accommodation, with a prefix of DV**

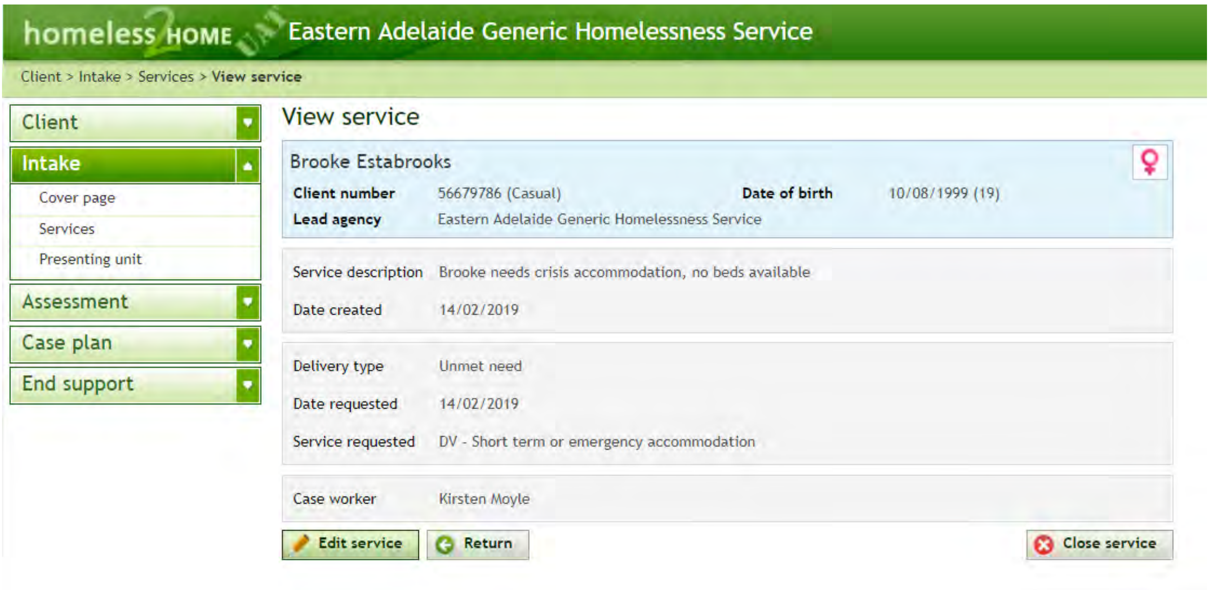
> ***Note****: Unmet needs that can be provided at a later point in time can be converted. The ability to convert is largely dependant upon the prefix chosen. Continue reading for further detail.*

Complete the remaining mandatory fields, and select the save button. You will then be directed back to the services page and the unmet need you entered will appear at the top of the page.

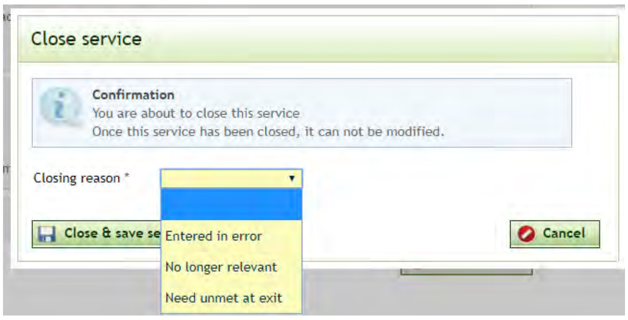


How to close an unmet need

If you have recorded an unmet need that was incorrect, or is no longer needed by the client, close it by clicking anywhere on the service to open it.



Select the 'close service' button and record the reason you are closing the unmet need.

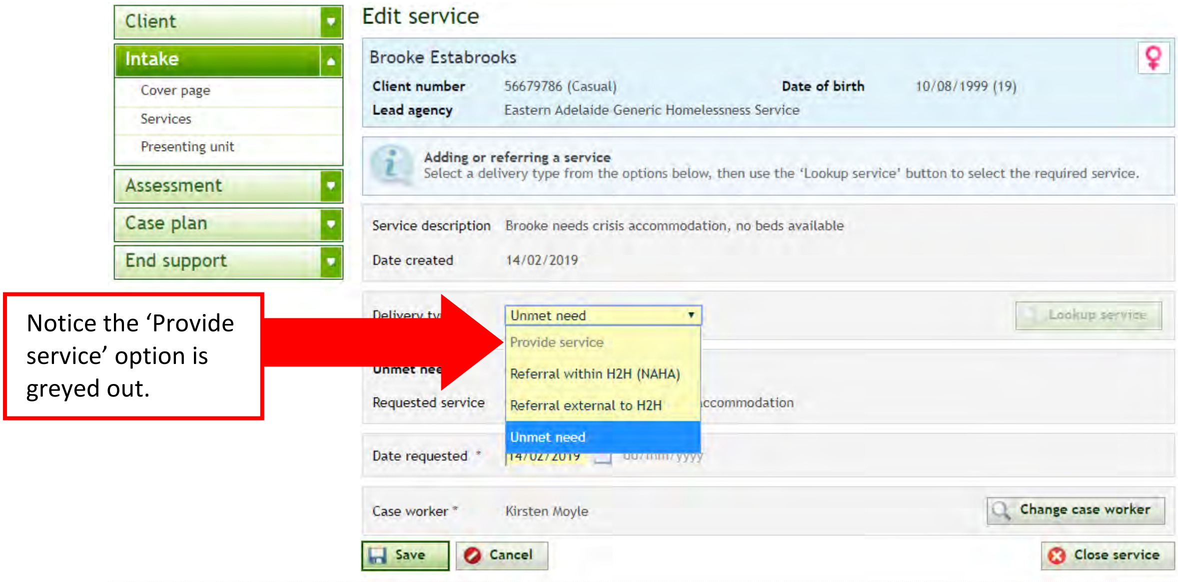


Converting an unmet need to a provided or referred service

If you are now able to meet the need for your client, you can convert the original unmet need to either provided or referred. This indicates that a need that had once been unmet, is now met.

To convert an unmet need, click on the edit pencil at the end of its row on the services screen. This will take you to the 'edit service' screen. This will enable you to convert the service using the 'Delivery type' drop down menu (as shown below).

When converting an unmet need, you may be restricted in your choice of delivery type. This is indicated by a choice within the menu being greyed out (as shown in the screenshot below). A delivery type might be greyed out if your agency does not provide this service.



Example: In the above scenario, it was entered that the client needed **DV – Short term/emergency accommodation.** When attempting to convert this there is only the option to refer the service, either internally or externally. It cannot be converted to a provided service because the current lead agency is a generic (GEN) agency and not funded to provide DV services.

What can I do if I cannot convert the unmet need to a 'provided service'?

As in the example above, if you have entered an unmet need that you cannot covert to a provided service it means that you have chosen a service that your agency is not funded to provide. In this case, you can either:

- *Delete the original unmet need and re-enter it with a Prefix that your agency provides (e.g. 'Gen' for generic funded agencies)*
  or
- *Convert it to a referral*

Once you have established the delivery type you will be converting to, select it from the delivery type drop down, complete all mandatory fields, and save the service. You will be returned to the services screen and see that the unmet need has been converted to the newly created provided or referred service in the services list.

Assessment

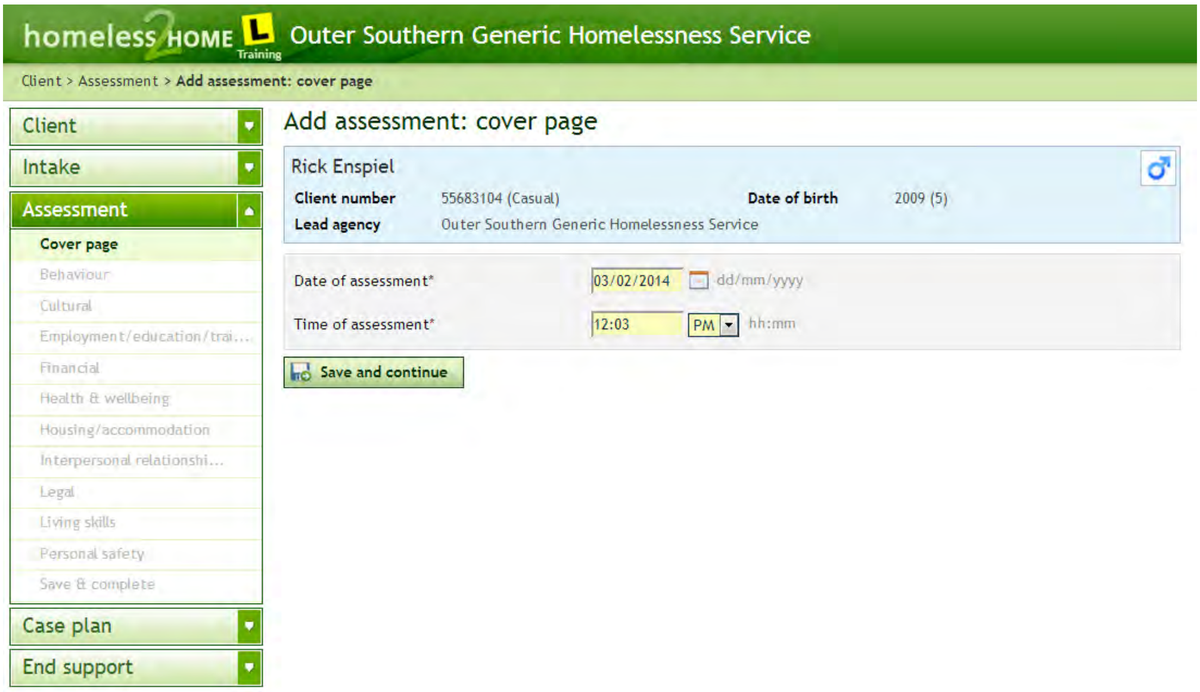
About the Assessment

The assessment assesses the factors that have led to your client becoming homeless, or at risk of homelessness. It provides opportunity for workers to record any existing strengths or support networks for the client within each life domain. Every strength, support network or issue that you record can be carried through to a client's case plan.

Starting an assessment

To begin an assessment, click the *Add assessment* button on the Assessment Cover page and enter a date and time that the assessment was conducted.

> ***Note:***
>
> *An intake must be completed before you can start an assessment. An assessment can be backdated, but no earlier than the date of intake. Assessments cannot be forward dated.*



The assessment menu

Within the assessment, there are ten 'life domains'. Each life domain contains a list of issues. Commencing an assessment takes you to the first life domain (Behaviour).

If your client does not have any issues within that life domain, you can use the menu to navigate to another life domain.

Within the assessment you can navigate between the life domains as often as needed until the assessment is saved. Once an assessment is saved using the *save & complete* button on the last page it can no longer be edited.

When issue is added to a life domain and the life domain is saved, a green tick will appear in the menu (as shown on the 'Cultural' page to the right).

A green circle next to a life domain, indicates an issue in that life domain was identified as part of the Intake presenting issues, these issues must be addressed before the assessment can be completed.

You do not have to complete every life domain, only complete the strengths, supports and issues that are relevant to your client's circumstances.

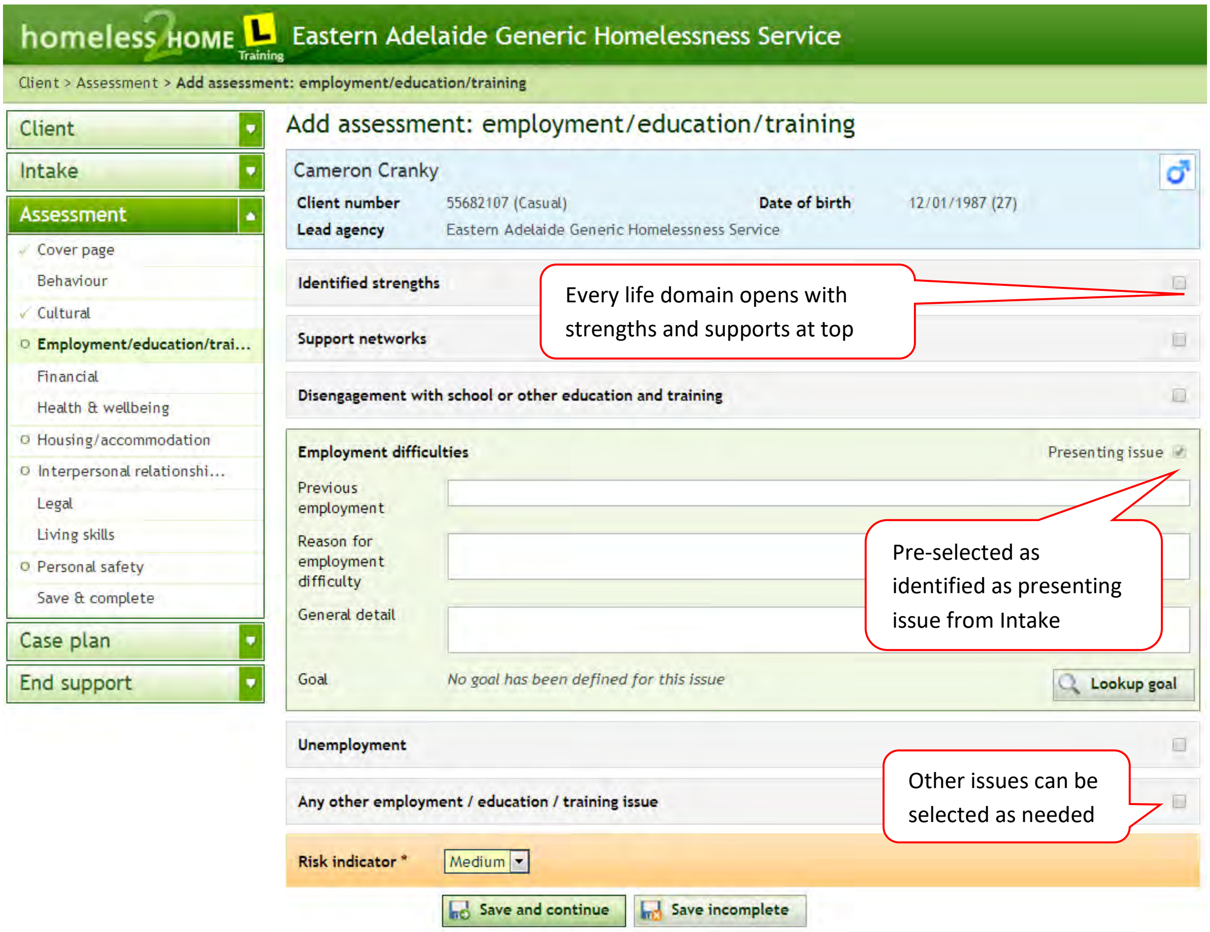
The green circle indicates that there is a 'presenting issue' identified on that page that must be addressed.

The Life Domain page

Within each life domain you can add details about your client's strengths, support networks and issues. Each life domain page contains fields for identified strengths, support networks and a set list of issues that can be selected. You can select as many as are relevant from this list.

Identifying and completing issues

Where an issue in the life domain was identified as a presenting issue from the client's intake this will appear as already selected and expanded (as shown below).

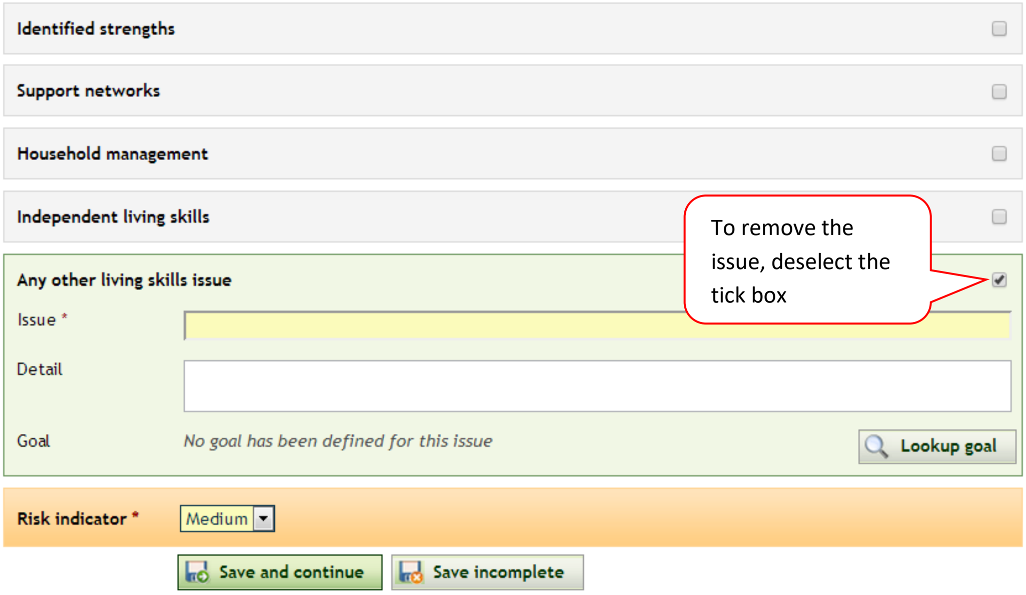


To complete the life domain, select each relevent issue and complete the fields that appear.

Removing issues from an assessment

Assessments can only be edited if they have not yet been saved. Once the *Save & complete* button has been clicked it cannot be edited.

To remove an issue from an assessment in progress, open the life domain that contains the issue and deselect the tick box that corresponds to the issue.



> ***note**:*
>
> *issues that were identified at intake as presenting issues cannot be removed.*

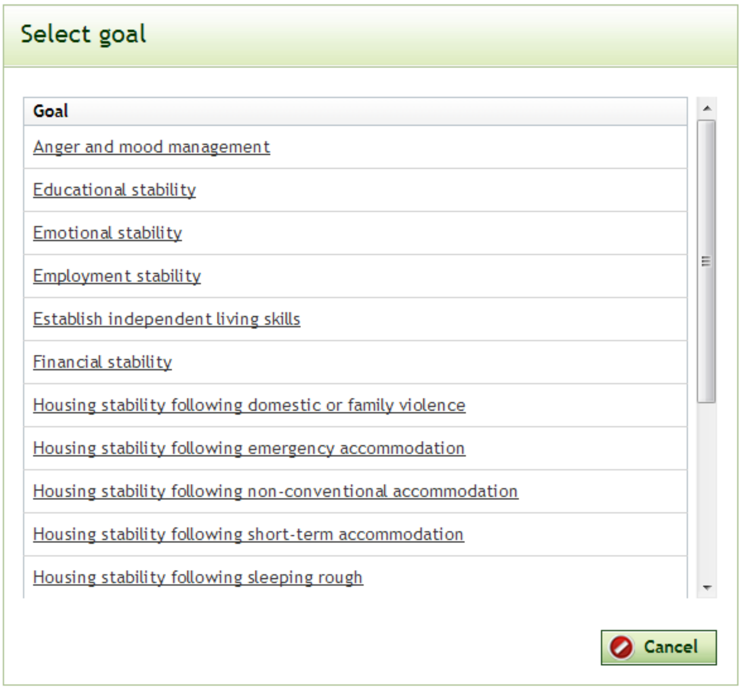
Goals

Every time an issue is selected within the assessment, you have the option to set a goal.

Setting a goal

To set a goal click the 'lookup goal' button in the bottom right hand corner of every issue (shown below).

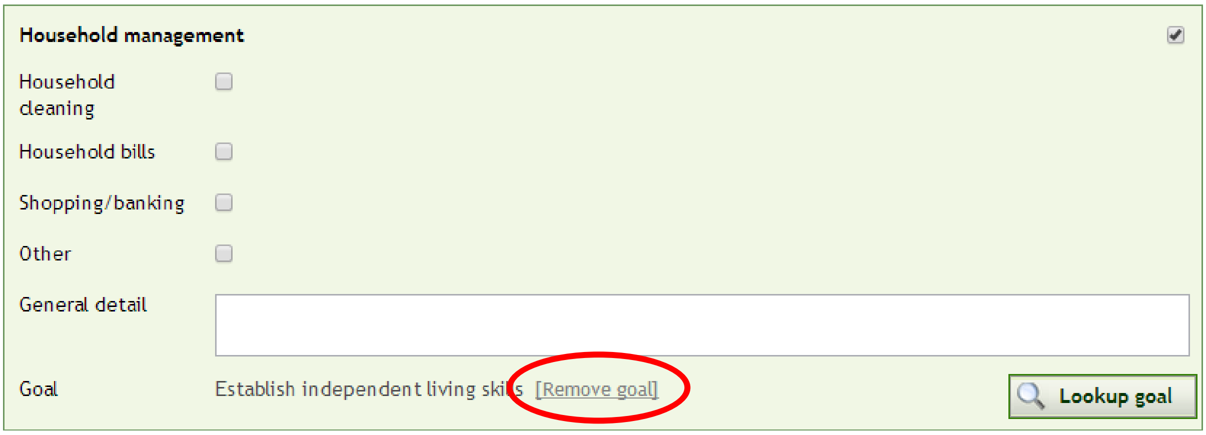
choose a goal from the pop-up box appears. You can use the scroll bar to view additional goals



> ***Note:***
>
> *It is optional to set goals in assessment. If you have not started setting goals with your client yet, the goal can be left blank until case plan stage*

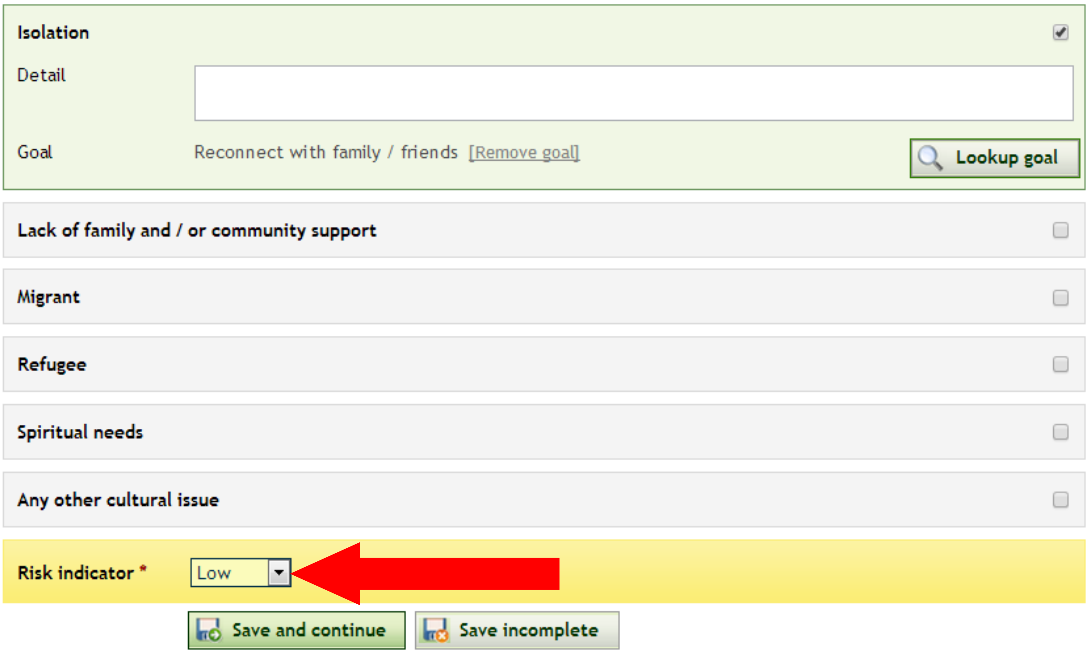
Removing a goal

To remove a goal, click the *Remove goal* button at the bottom of the issue panel. You can now remove the goal or choose a different one.



Risk indicator

Where a life domain has one or more issues selected you will see a risk indicator at the bottom of the page. This indicates the person's risk of homelessness for that life domain. The level of risk is calculated automatically depending on the type(s) of issues selected and may be low, medium or high. It can be changed by using the drop-down box and choosing another risk level.



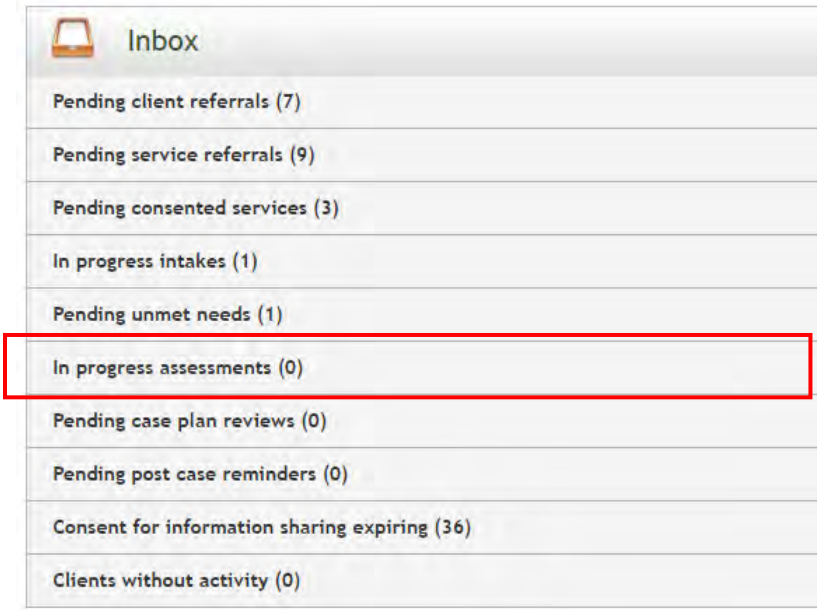
Saving the assessment

Once you have finished assessing your client's strengths, support networks and issues you need to finalise the assessment. Ensure you have addressed all the life domains that show a green circle in the menu, then navigate to the Save and complete screen in the Assessment menu.

There are two options for saving your assessment;

- Save and Complete
- Save Incomplete

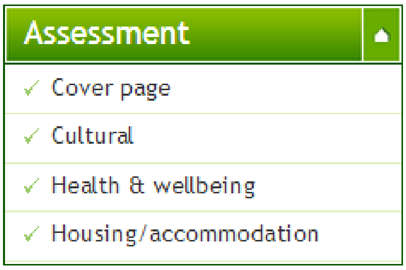
If you select save the assessment as incomplete you have 30 days to complete it before it is automatically closed. A reminder will appear on the home screen warning you if the assessment is soon to be automatically closed.



> ***Note****:*
>
> *Once your assessment has been saved you will no longer be able to edit or make any additions. Assessments are a 'point in time' assessment of the client's issues at the beginning of their support period*

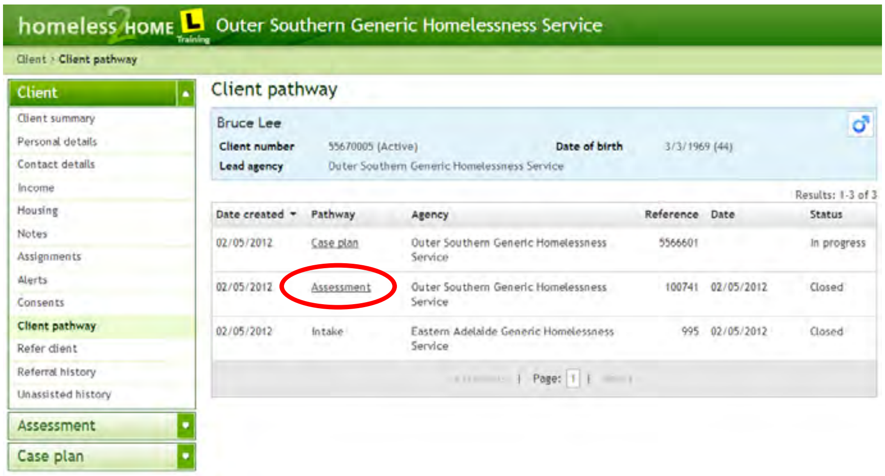
Viewing a saved assessment

Once saved, the assessment menu will only show the life domains in which strengths, support networks or issues have been identified.



To view the details of a saved assessment, click on any of the life domains in the assessment menu.

> ***Viewing historical assessments:***
>
> *Historical assessments as well as intakes and case plans can be viewed from the client pathway page (providing you have permission to access the information) by simply clicking the underlined item. If the item is not underlined, it means you do not have permission to view detail.*


homeless2HOME
Training
Outer Southern Generic Homelessness Service
Client › Client pathway
Client
Client summary
Personal details
Contact details
Income
Housing
Notes
Assignments
Alerts
Consents
Client pathway
Refer client
Referral history
Unassisted history
Assessment
Case plan
Client pathway
Bruce Lee
Client number 55670005 (Active)
Date of birth 3/3/1969 (44)
Lead agency Outer Southern Generic Homelessness Service
Results: 1-3 of 3
Date created Pathway Agency Reference Date Status
02/05/2012 Case plan Outer Southern Generic Homelessness Service 5566601 In progress
02/05/2012 Assessment Outer Southern Generic Homelessness Service 100741 02/05/2012 Closed
02/05/2012 Intake Eastern Adelaide Generic Homelessness Service 995 02/05/2012 Closed
Page: 1

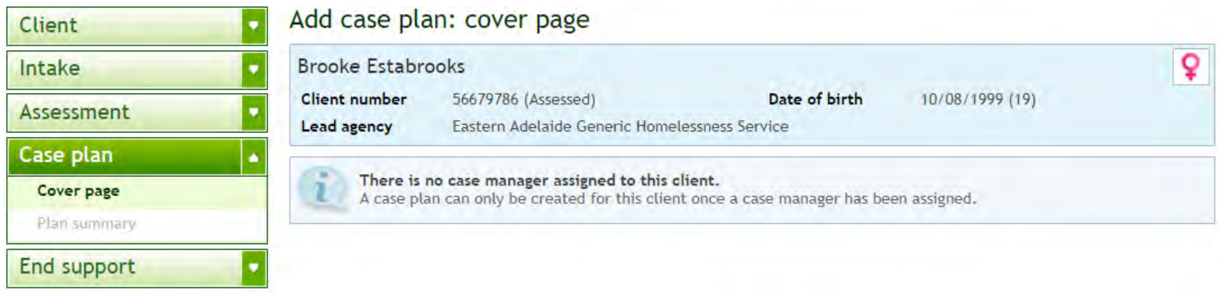
homeless2HOME

Case Plan

Prior to starting a case plan

Before you can start a Case plan, an Assessment must be completed and saved. Refer to the 'Assessment' section for instructions on how to do this.

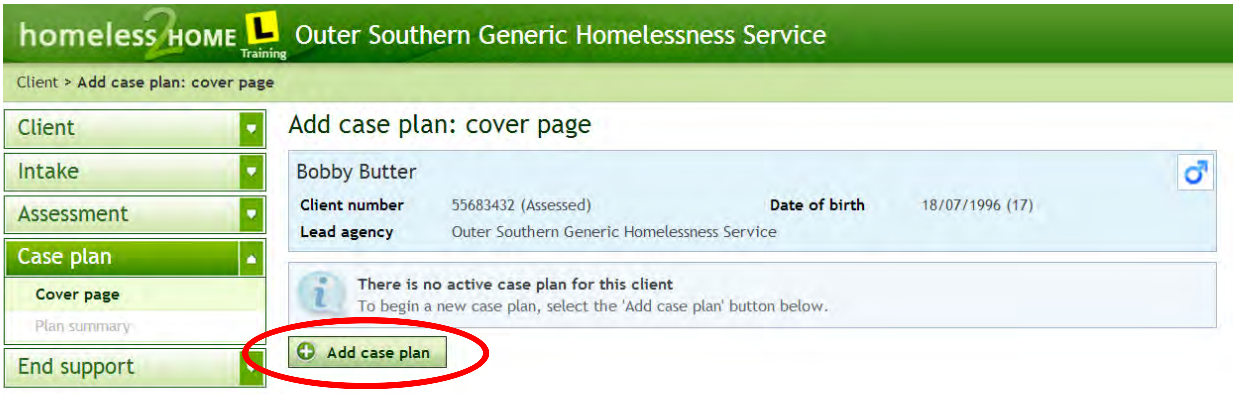
A case manager must be assigned before a case plan can be created.



Only workers with agency manager access can assign case managers and caseworkers to clients. For assistance with the assignments function, please see the [assignments](#) section of this manual.

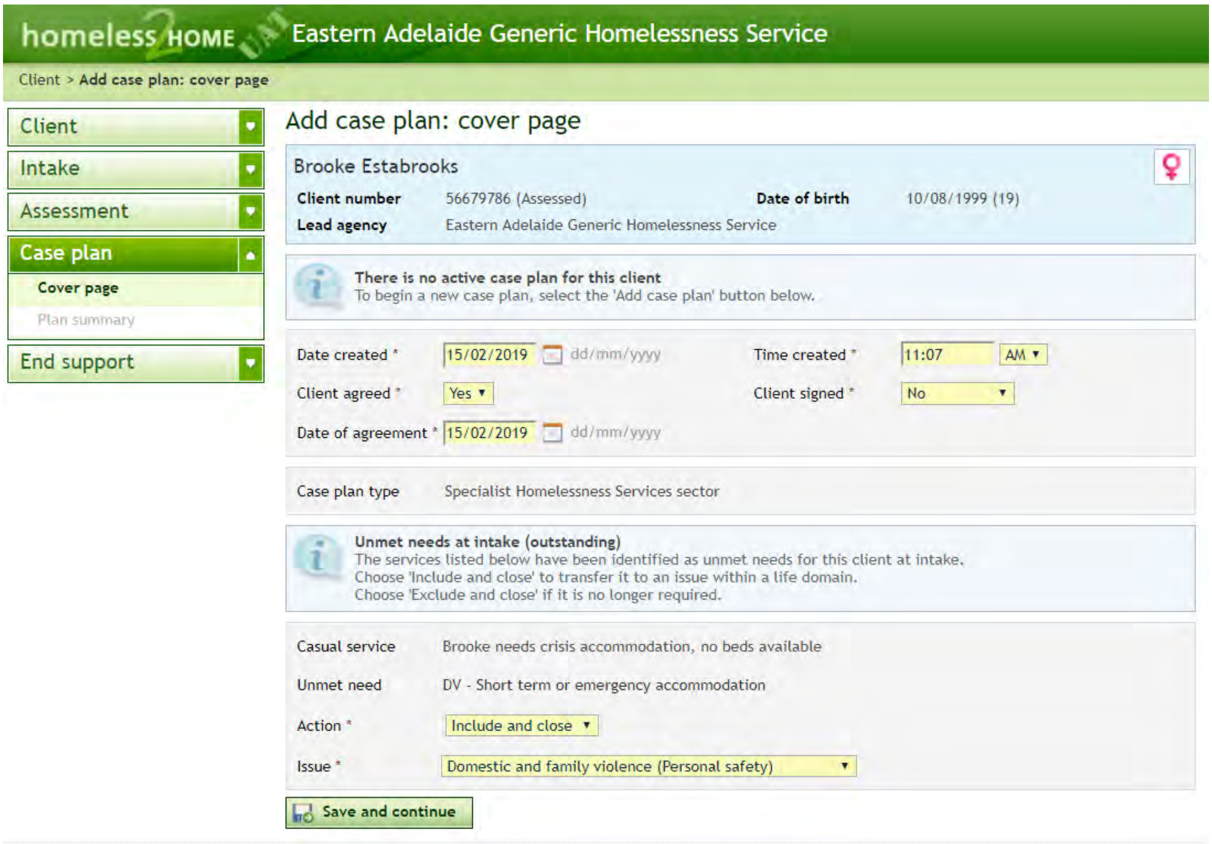
Starting a case plan

To start a case plan, navigate to the case plan menu, click on the cover page, and click the *add case plan* button (shown below).



> ***IMPORTANT:***
>
> *A client must agree to a case plan for one to be created. If your client does not agree, you will not be able to add one. All support would continue to be recorded under the intake services function.*

You will then need to complete the fields shown below indicating the date, time of creation and the client agreement.



If there are open services entered within the intake when you start a case plan, you will be prompted to either exclude and close the services or include them in the case plan.

If you include the services (as shown above) you will need to assign each service to a life domain.

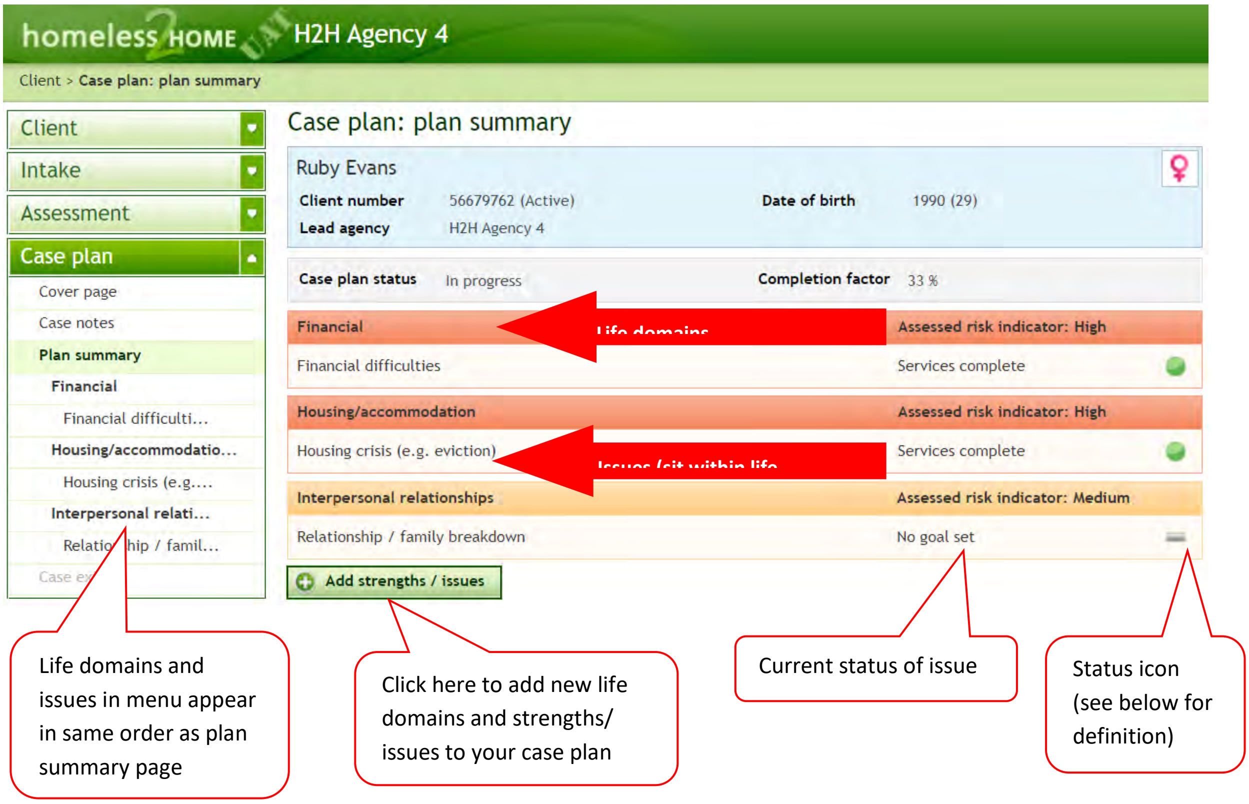
Clicking save and continue on the case plan cover page will take you to the case plan summary page.

The plan summary page

The plan summary page (shown below) gives an overview of your case plan. The page is divided into **life domains**, under each life domain are the strengths, support networks and issues as identified during assessment.

You can navigate around the case plan by clicking either on the life domains, or issues in the left-hand menu, these can also be accessed from the case plan summary page.

For each issue a status an icon is displayed. For example, in the screenshot below you can see *services complete, no goal set* and *No services assigned* next to corresponding issues.



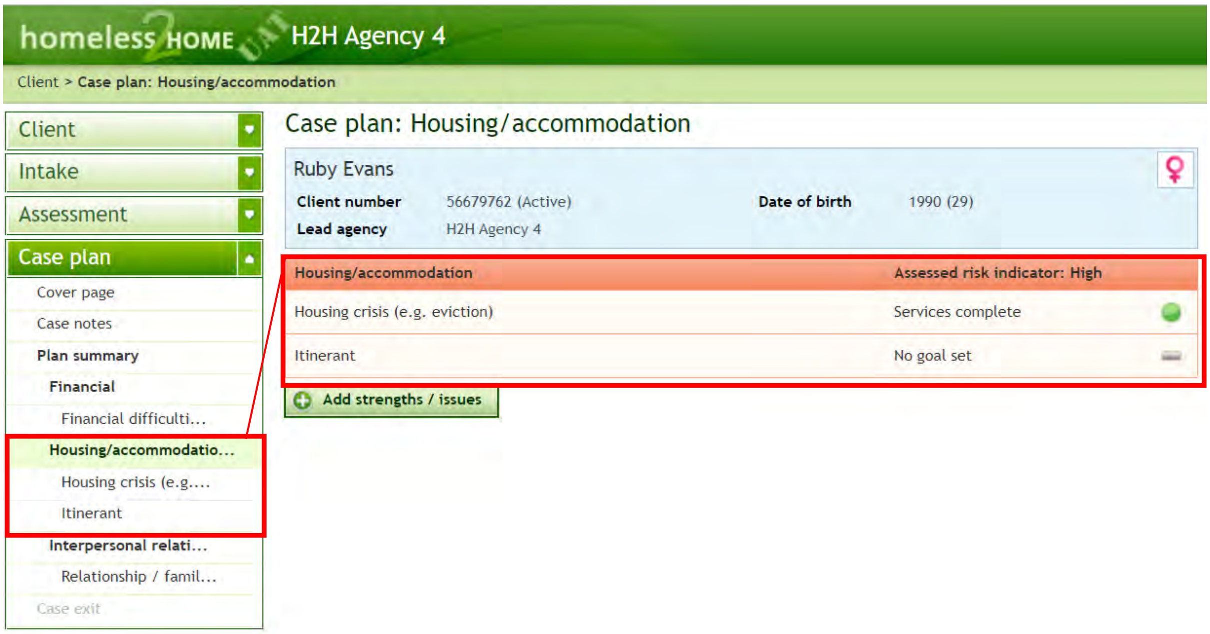
The status icons at the end of each issue row give a visual representation as to the status of that issue. See the chart below for an explanation of each icon.

Case Plan summary icon definitions	
	All services have been completed for this issue
	Services entered for this issue are still open (incomplete)
	All services have been completed and the goal has been closed
	No goal has been set for this issue
	The goal has been closed for this issue, but no services were added
	Indicates an identified strength or support network

When you start your case plan, it contains only the life domains and issues that were entered at assessment.

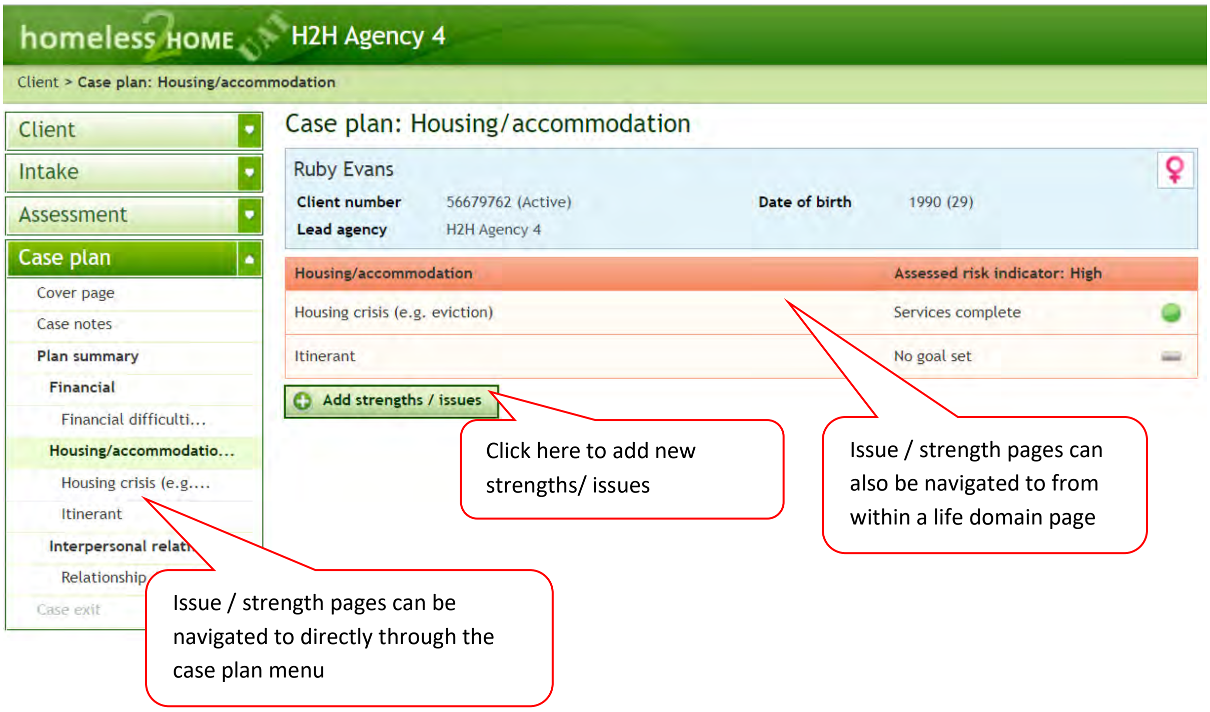
Life domains

Within the case plan, each life domain displays the issues that sit within that life domain. Like the plan summary page, you can add further issues or strengths to the case plan from this page.



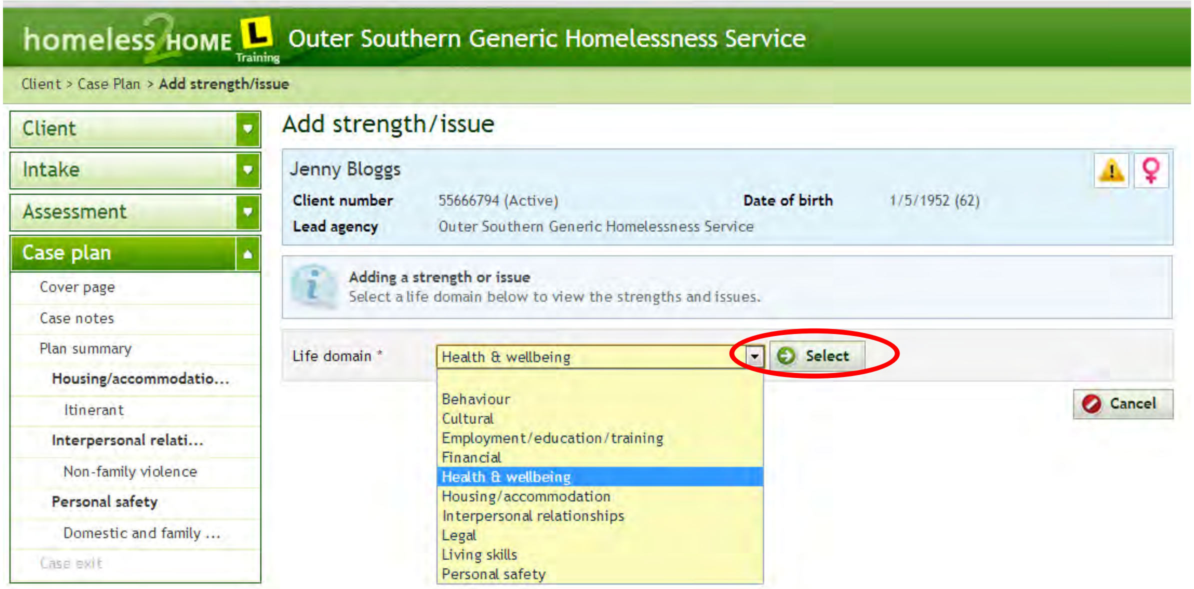
Strengths/Issues pages

Every strength or issue within a case plan has its own page. These pages can be navigated to from the plan summary page, life domain pages or from the case plan menu.



Adding new strengths/issues to a case plan

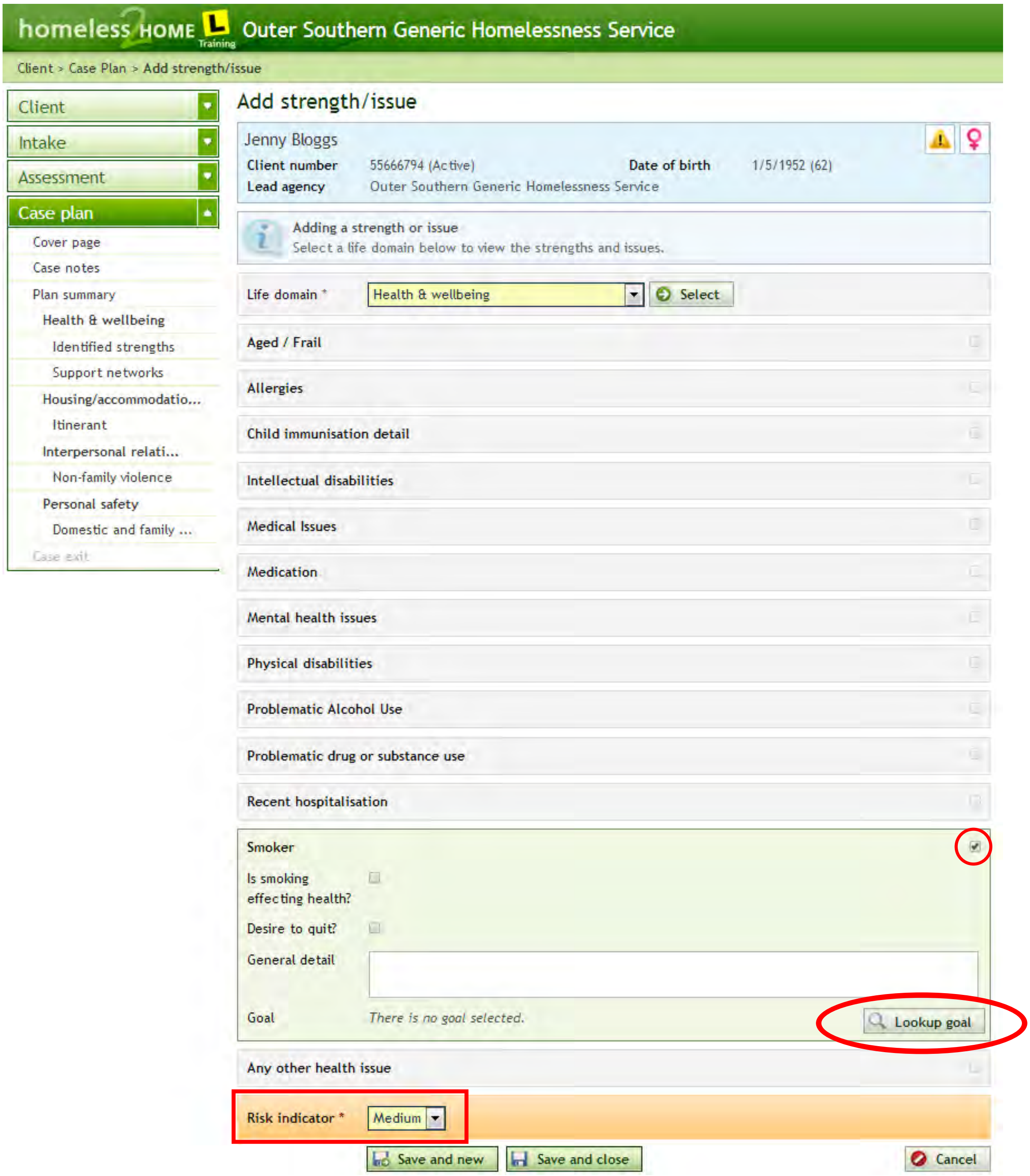
You can add new strengths or issues to a case plan by clicking the *add strengths/issues* button on the plan summary page. Next, choose a life domain from the drop-down field and press *select,* as shown below;



This will provide a list of issues within the life domain. The issues are set out in the same format as the assessment. To add an issue, tick the issue you want (as shown on next page) and complete the relevant fields.

You can add a goal for the issue via the *lookup goal* button. Setting a goal at this stage is not mandator, but a goal must be set before services can be added.

Each life domain page has the risk indicator at the bottom of the page. For more information about the risk indicator see the assessment section



When you have finished adding details to the issue, select *save and new* to continue adding further issues or strengths to the case plan or *save and close* to return to the plan summary page.

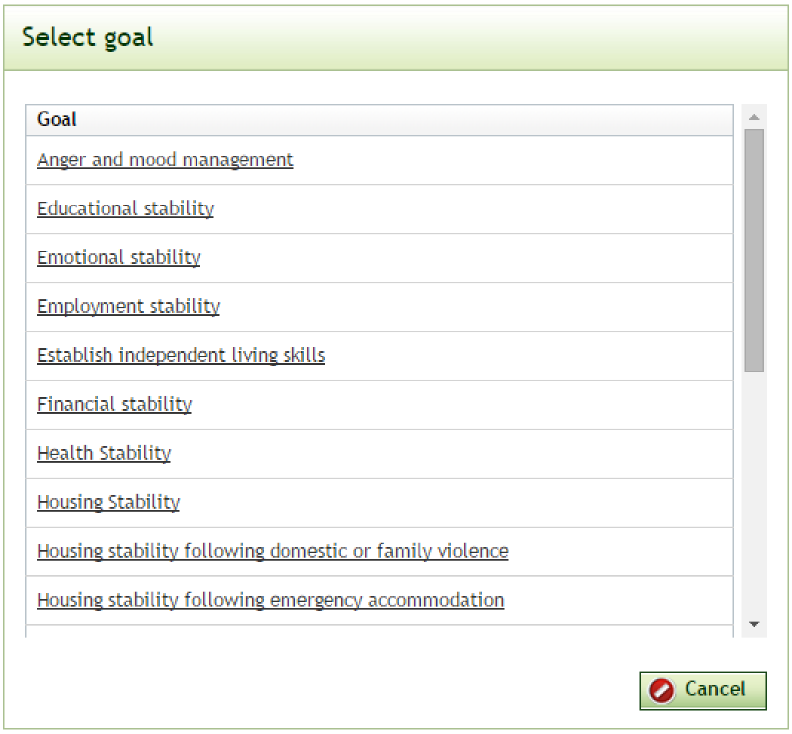
The issue page	
1	View the details of the issue by clicking *more* in the green banner
2	Add or change the set goal for this issue by clicking the *add goal* or *change goal* button
3	Remove the goal entirely by clicking the *remove goal* button
4	Record services provided, referred or unmet needs for the client by clicking the *add service* button
5	Close the issue by clicking the *close and save issue* button

Goals

In order to add services to an issue in the case plan, a goal must be selected from the goals list. If there is no goal assigned to the issue, you will not be able to add services. This is indicated by the 'add service' button appearing greyed out, as shown below;

Adding/ changing a goal

A goal can be added or changed by clicking the *select goal* or *change goal* button within the issue screen. Clicking this button brings up the *select goal* pop up screen (as shown below). To select a goal, click the relevant choice. A goal can be changed an unlimited number of times.

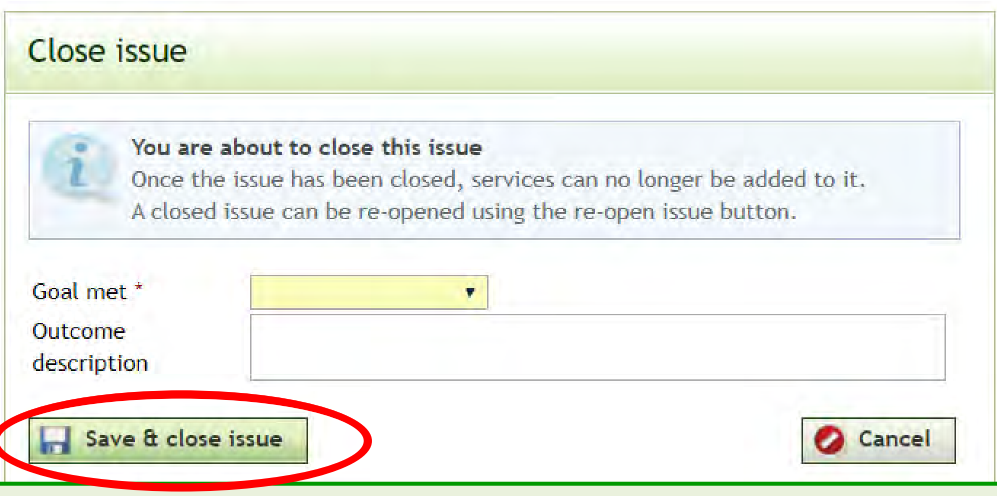


Closing and saving an issue

When an issue has been resolved or is no longer relevant to the client it can be closed. To do this click the *close and save issue* button on the issue screen.

A pop-up box will then appear asking if the goal has been met and a description of the outcome.

Complete the relevant fields and click the *Save and close issue* button to finalise.

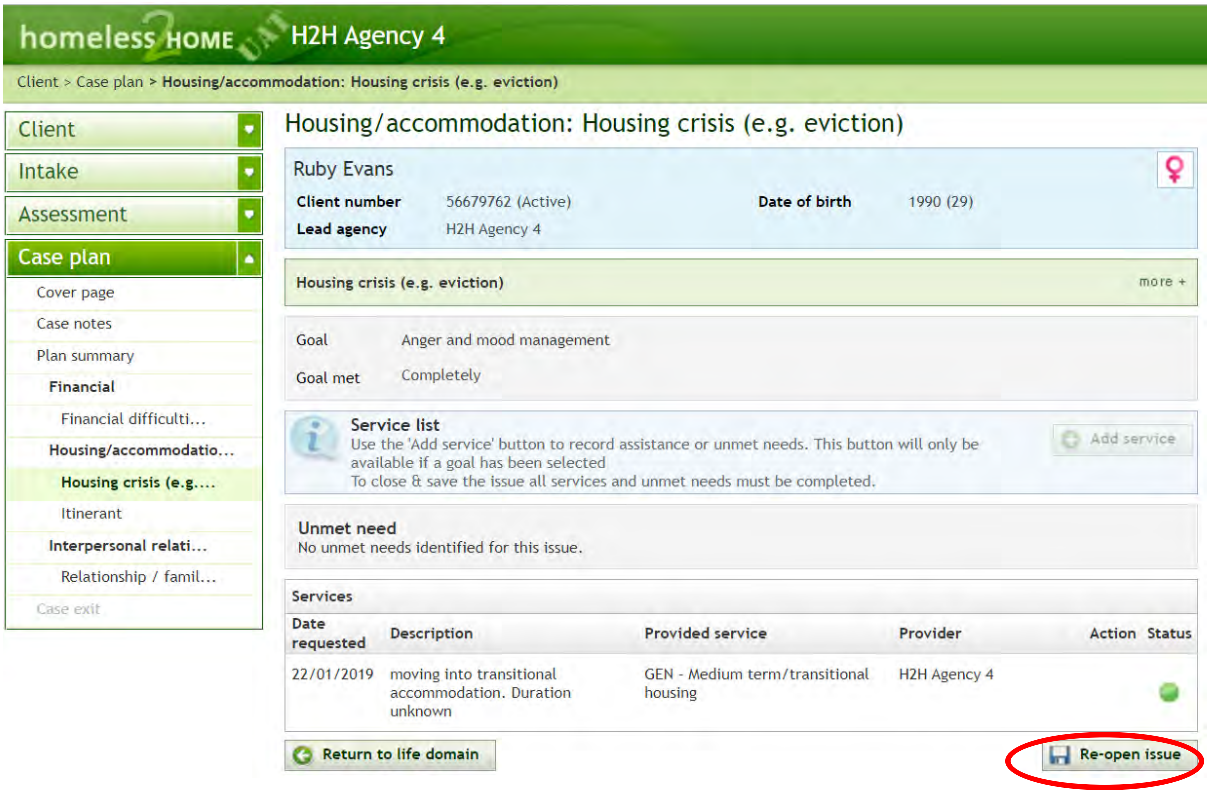


To summarise:

- *A goal must be set before services can be added to an issue*
- *All services must be closed before the issue can be closed*
- *Closed issues can be re-opened if needed*
- *When closing an issue that has not had any services entered, you are limited to **no longer relevant** or **not at all** when recording if the goal has been met*

Re-opening an issue

To re-open an issue that has been previously closed, navigate to the issue page in question and click the re-open issue button in the bottom corner (as shown below).



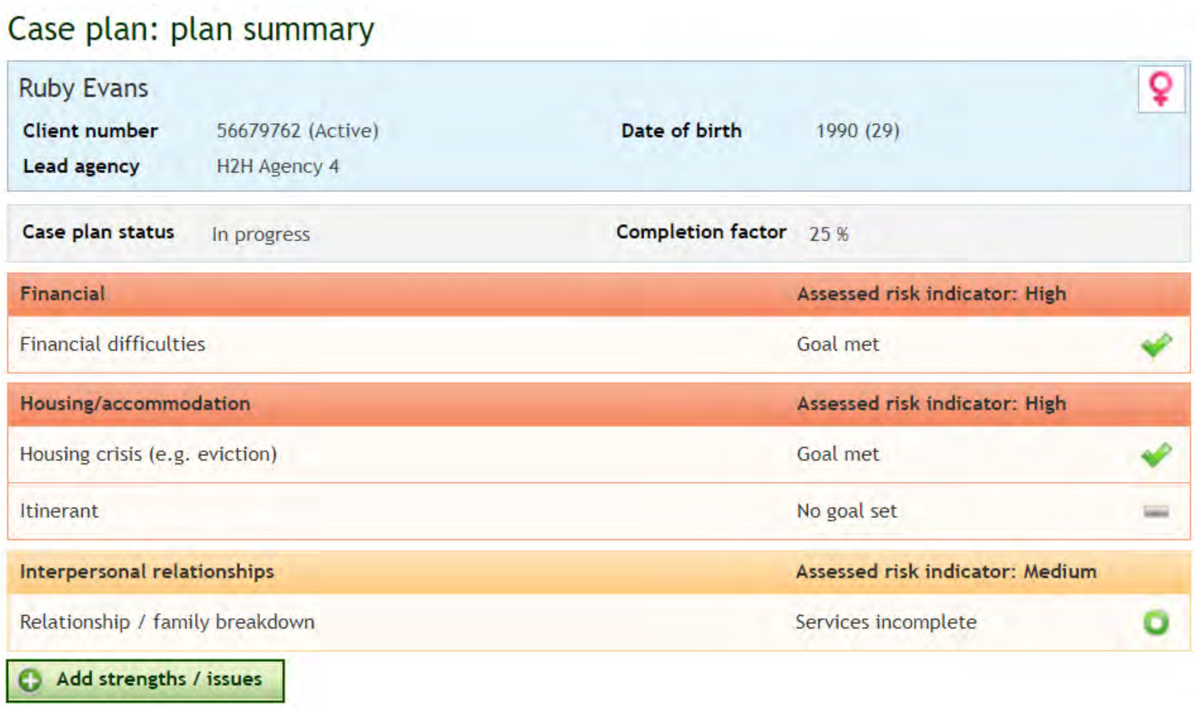
Case plan goal status

At the end of each month, the case plan goal status is reported to the AIHW for all clients with an open case plan.

The goal status is set by looking at the number of issues in the case plan, and their completion status, to work out an overall achievement status of the case plan.

Examples of Case plan goal status during support	
Not at all	0/6 goals achieved
Up to half	1-2/6 goals achieved
Half or more	3-5/6 goals achieved
All	6/6 goals achieved

For example, the case plan shown below, with 2/4 issues closed as 'goal met', would have an overall goal completion status reported to the AIHW of goals achieved = half or more.



Case Plan Services

As with intake services, a case plan service is a way of recording the following;

- The services and assistance your agency provided to a client
- Any services and assistance provided by another SHS or mainstream provider
- Any services the client needs that cannot be provided (unmet needs)

> ***Note:***
>
> *An intake service and a case plan service are the same thing – a method of recording assistance provided to a client, but added from different stages of the client pathway*

The add service function in case plan operates in the same way to the services function found in intake except for 3 features:

- **Case plan services** include a progress percentage that can be used if desired, a feature that **intake services** do not have
- **Case plan services** are added to the life domain and issue the assistance related to; this is different to **intake services**, which are collated in a single list
- Service notes can be added to an open case plan service

Once a case plan is opened all future services provided to a client are recorded as part of this case plan and the ability to enter services under the intake menu is removed. Below is a table defining the different types of icons that can be found on this issue screen.

Issue page icons and definitions	
	Edit service button.
	The service is still open (has not yet been closed and end date has not passed).
	The service is still open however it has passed its end date and requires closing.
	Withdraw button. The service has been sent as a referral which has not yet been accepted and can be withdrawn if needed.
	Service has been closed and saved as 'completed'.
	Service has been closed and saved as 'entered in error'.
	Repeat service button (only available when the service is closed).
	Pending service referral that has not been accepted, or consented service notification not accepted by lead agency
	Referred or consented service that has been rejected

When to add a case plan service

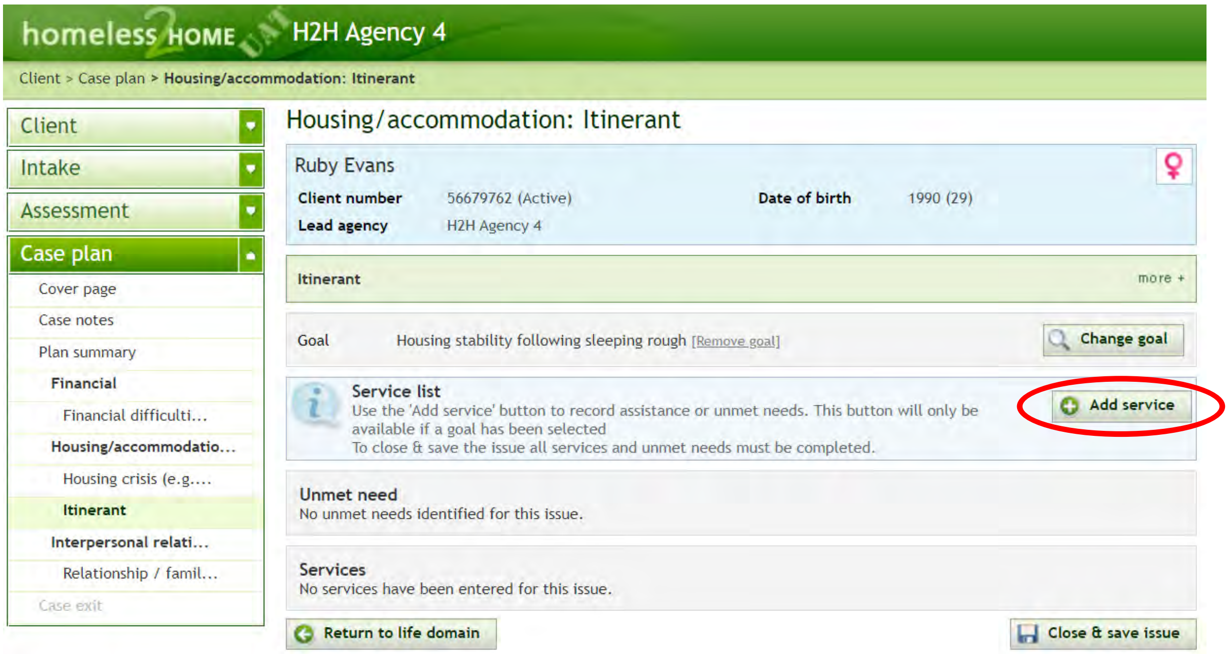
A service should be recorded each time your client is provided with direct assistance, is assisted by another service provider, or an unmet need is identified.

To warrant a service being recorded, the client must have directly received something from your agency, another agency, or have an unmet need.

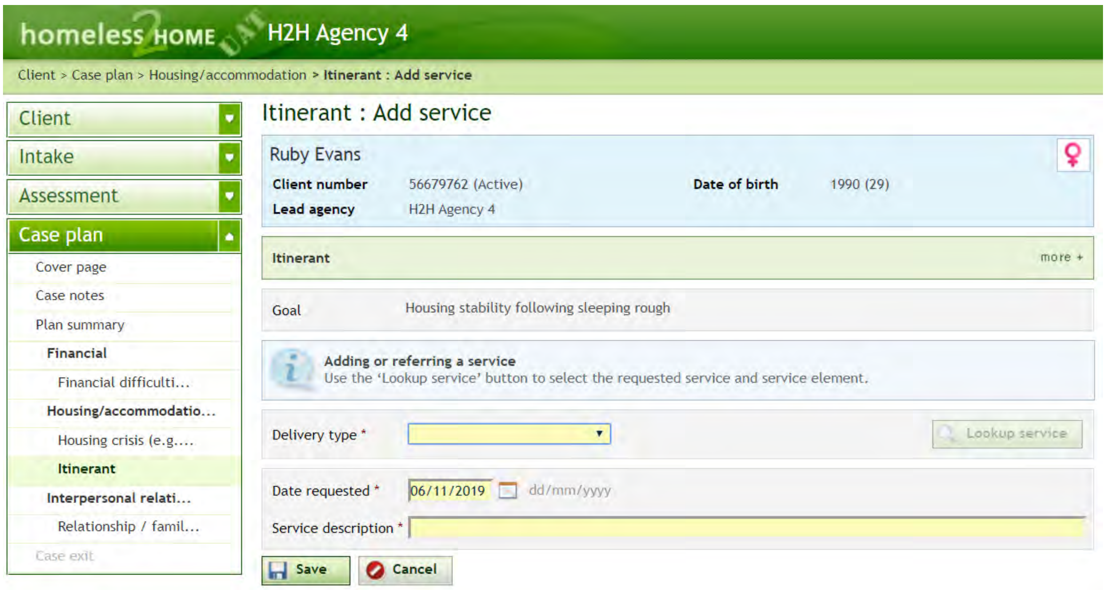
How to add a case plan service

To add a service, navigate to the relevant issue page within the case plan and click the *add service* button.

Note: the *add service* button is only available if a goal has been set for that issue.



the add service screen will appear (shown below). Case plan services are added the same way as intake services.



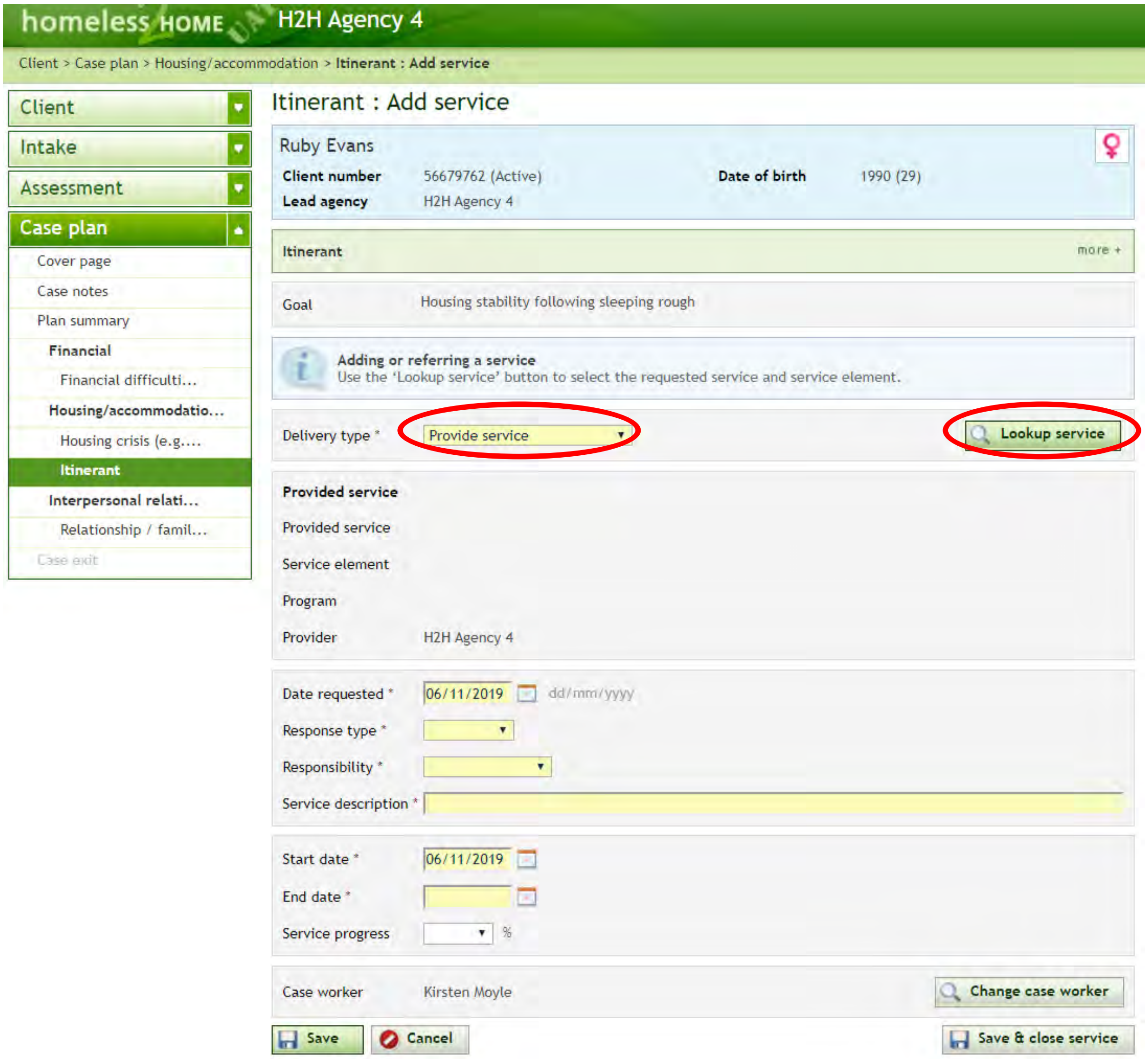
As with intake services, there are three delivery types;

Delivery Type Definitions	
Provided Service	• refers to a support service which is provided directly by your agency • All support provided should be recorded – even if the client does not acknowledge a need for services • Can be entered by either a lead or consented agency • You should only record that accommodation has been provided if you have provided the client with the actual accommodation e.g. agencies that have onsite crisis accommodation or medium term/transitional accommodation.
Referred service (within H2H or external to H2H)	In the instances where you have arranged for a service to be provided to your client by another agency, this is recorded as a Service Referral. Referrals are either to internal agencies (those agencies that use H2H), or external agencies (those agencies that do not use H2H). • You would enter a referred service if you refer a client to another service provider AND that service provider accepts the client for an appointment or interview • **Do not** complete a service referral if the client is **NOT** accepted for an appointment or interview. In that circumstance you would enter an 'unmet need' (see below) • You only record that accommodation has been referred if you referred the client to another service provider to provide the actual accommodation
Unmet need	Used to record instances where a client needs a type of assistance that cannot be provided or referred. • This refers to any services or assistance you assess the client as needing, whether or not the client accepts or agrees to participate in this support service. • Even when a service cannot be provided, it is important to record the client's needs because this helps to identify unmet need.

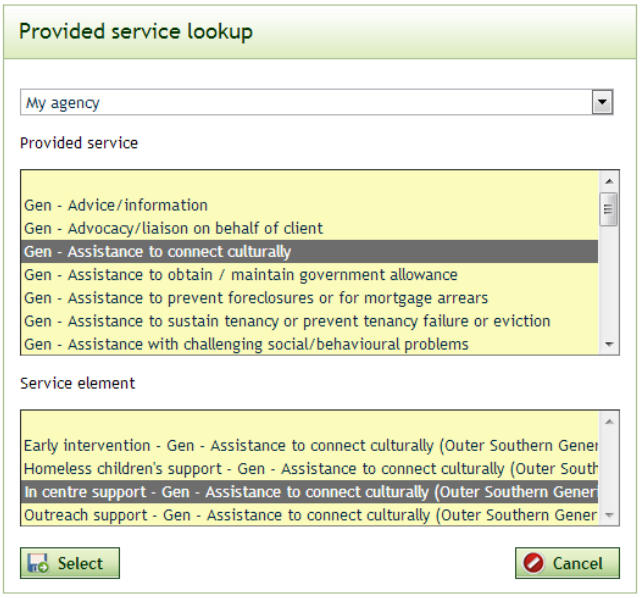
Provided Service

How to add a provided service

Select the provide service from the delivery type drop down menu as shown below;



Next click the *lookup service* button (as shown above). The provided service lookup box will then appear (as shown below). Make the relevant selection based upon the service and service element you have provided and click the *select* button.

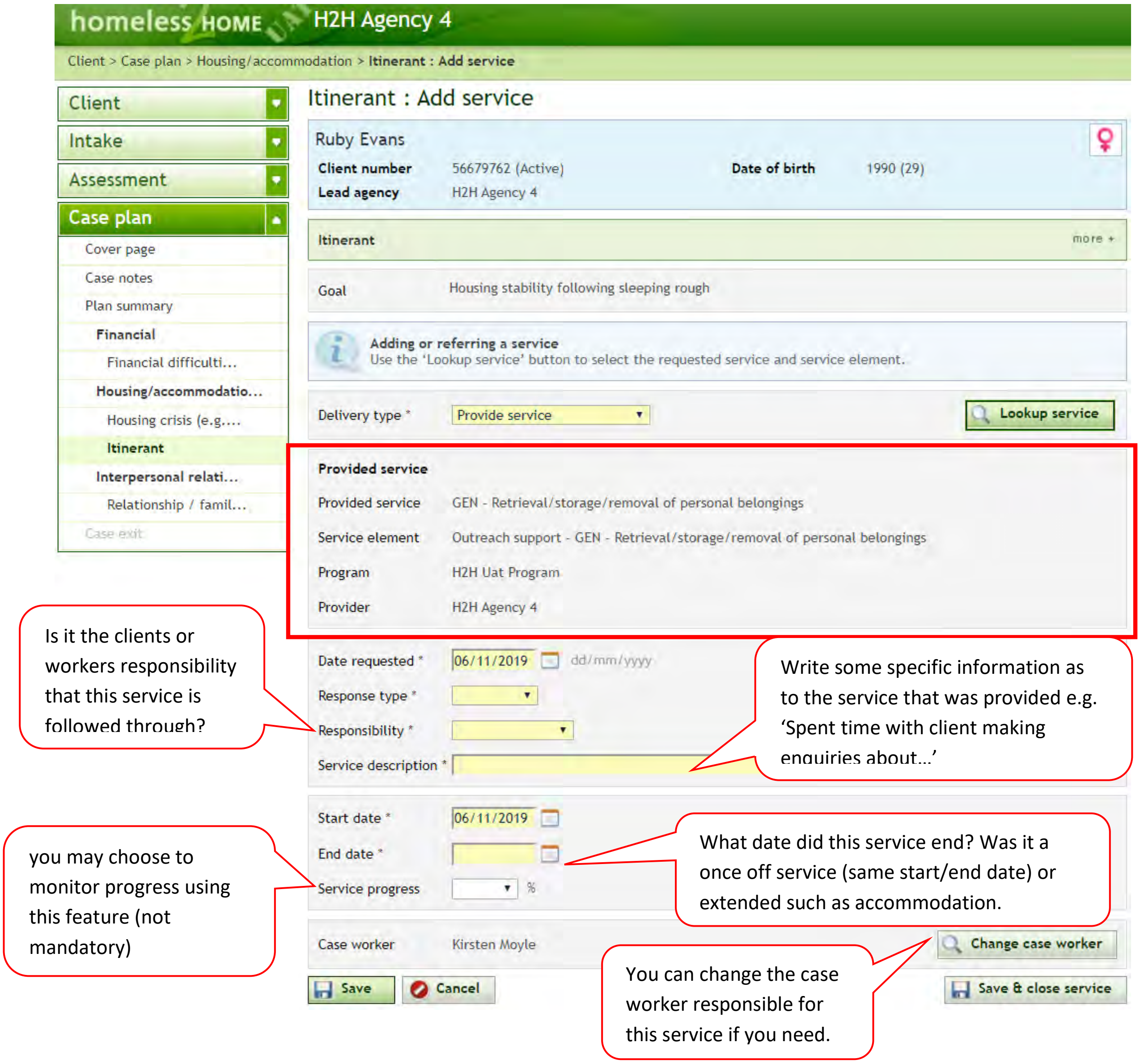


***Note**:*

The list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency is part of an alliance. If you are unsure which service element to choose for the clients' particular circumstance, speak to your team leader or manager. You can find definitions for each service element at the end of this user guide.

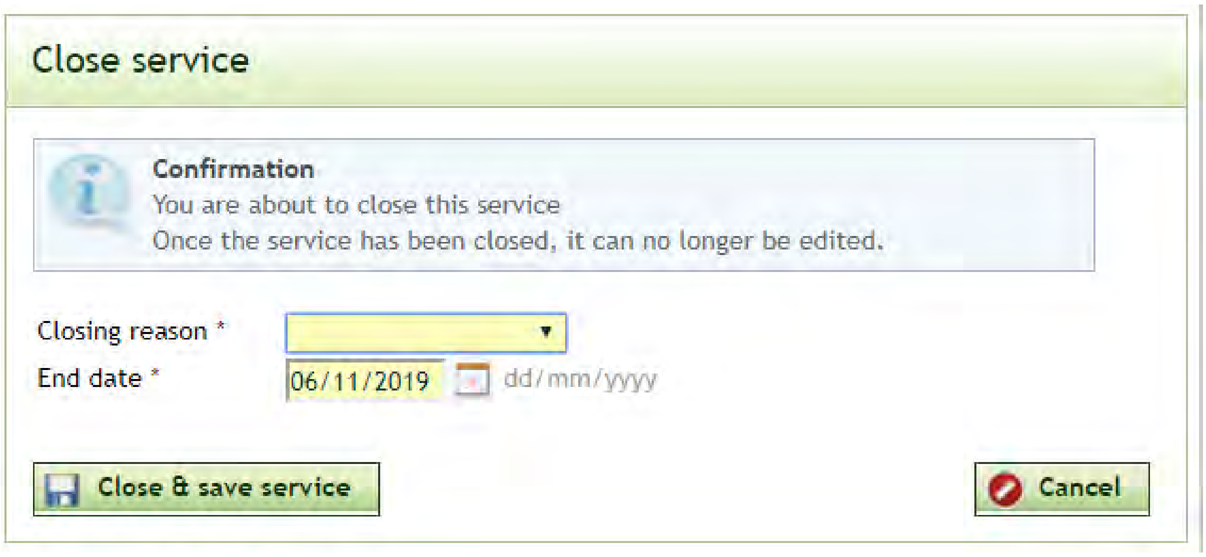
This will return you to the *add service* screen with the first four fields now pre-filled based upon the information you selected (as shown below).

complete the remaining fields on the screen;

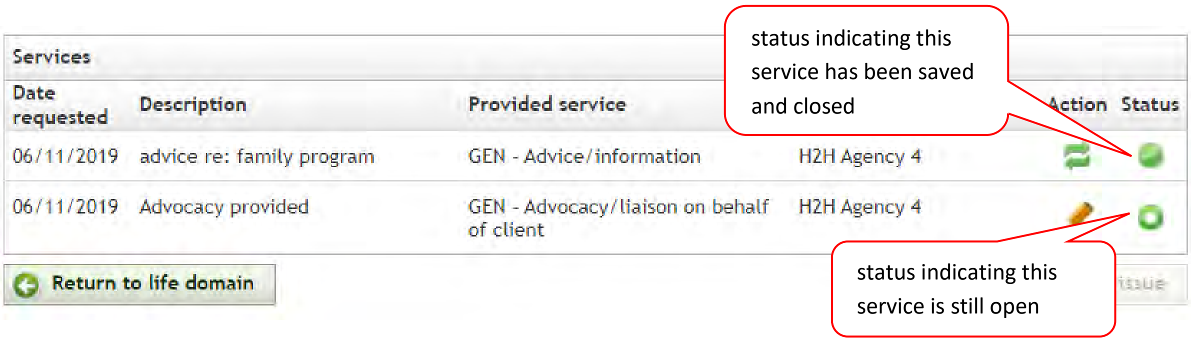


- To save the service but leave it open select the save button on the left as shown below. You would do this if the service has an end date in the future
- The service will close automatically as 'fully completed' when it passes it's set end date
- To save the service and immediately close it as completed, selected the 'save & close service button on the right as shown below

If you select to save & close the service the following pop up will appear; complete the closing reason and end date to continue.



Closing and saving the service returns you to the issues page. The entered service will appear in the service list (shown below).



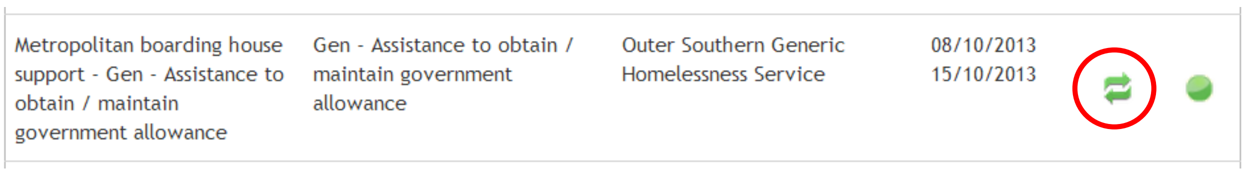
Editing a provided service

Open services can be edited by clicking the edit pencil at the end of the relevant row. Once a service has passed its end date it can no longer be edited. The only information that can be edited once a service has been added is the following;

- Date requested
- Responsibilty
- Start date
- End date

Repeating a service

Closed services will display a repeat icon instead of an edit pencil.



Repeating a service is a quick way to record any assistance that may have been provided to your client more than once. Using this function pre-fills many of the fields that you enter when adding a new service.

> ***Example:***
>
> *You provided transport to take your client to a doctors appointment on Monday. On Wednesday your client requires transport again to a follow-up appointment.*

In the example above the service of ‘transport’ would have already been entered on Monday. Rather than entering a new service on Wednesday, you could click the repeat service button that corresponds to Mondays transport service.

Consented Services

Consented services allow agencies to record their co-case management. For the non-lead agency to add a service to the lead agency's case plan, some initial steps must be completed first.

The lead agency should

- select which issue(s) the consented agency will be supporting the client in
- from that issue(s), complete an internal service referral to the consented agency
- the consented agency manager must then accept the referral, and assign to the worker who will be assisting the client
- once this has been completed, the worker/agency manager will be able to add additional provided services as needed
- each service generates a notification back to the lead agency, which must be accepted (see referrals menu section for further detail)

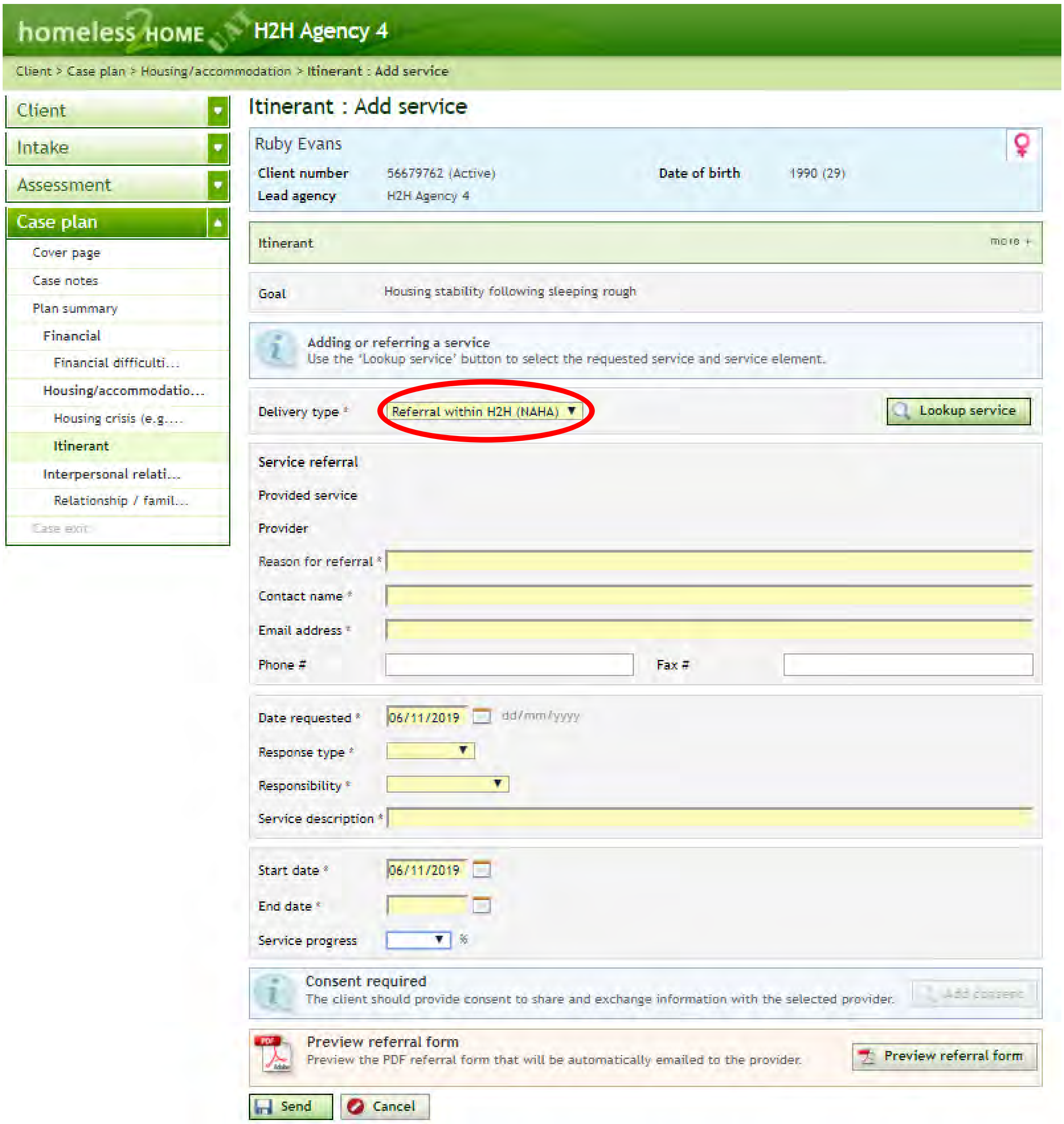
Referrals within H2H (internal referrals)

Internal referrals are used to record where the client is provided with assistance by another SHS agency.

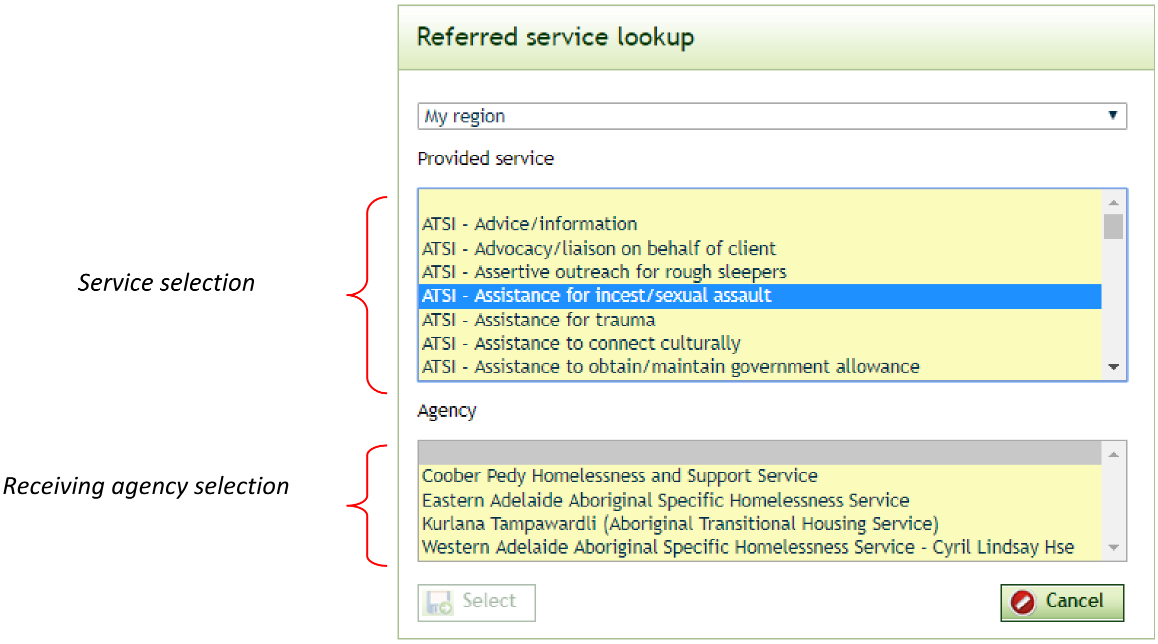
How to add an internal referral

To send a service referral to another agency that uses H2H, use the *referral within H2H* function. To do this click into any issue page within the case plan and click the *add service* button. As discussed earlier, the *add service* button is only available if a goal has been set for that issue.

On the *add service* screen, choose *Referral within H2H* from the *Delivery type* drop down field (as shown below).



Click the *lookup service* button and the *referred service lookup* box will appear. Select the service you are referring from the top section, and the agency you are sending the referral to in the bottom section and click the *select* button.

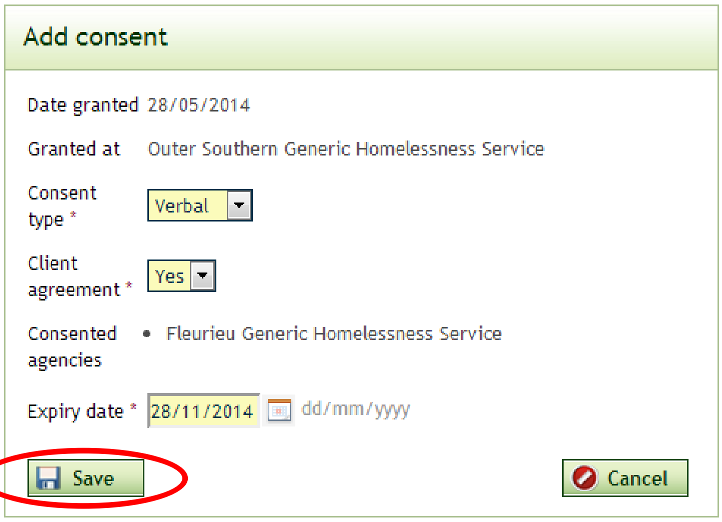


> ***Note:***
>
> Ensure you select the correct prefix for the agency you are referring to; e.g. if you were referring a client to a domestic violence service for counselling, you would select the 'DV' prefix.

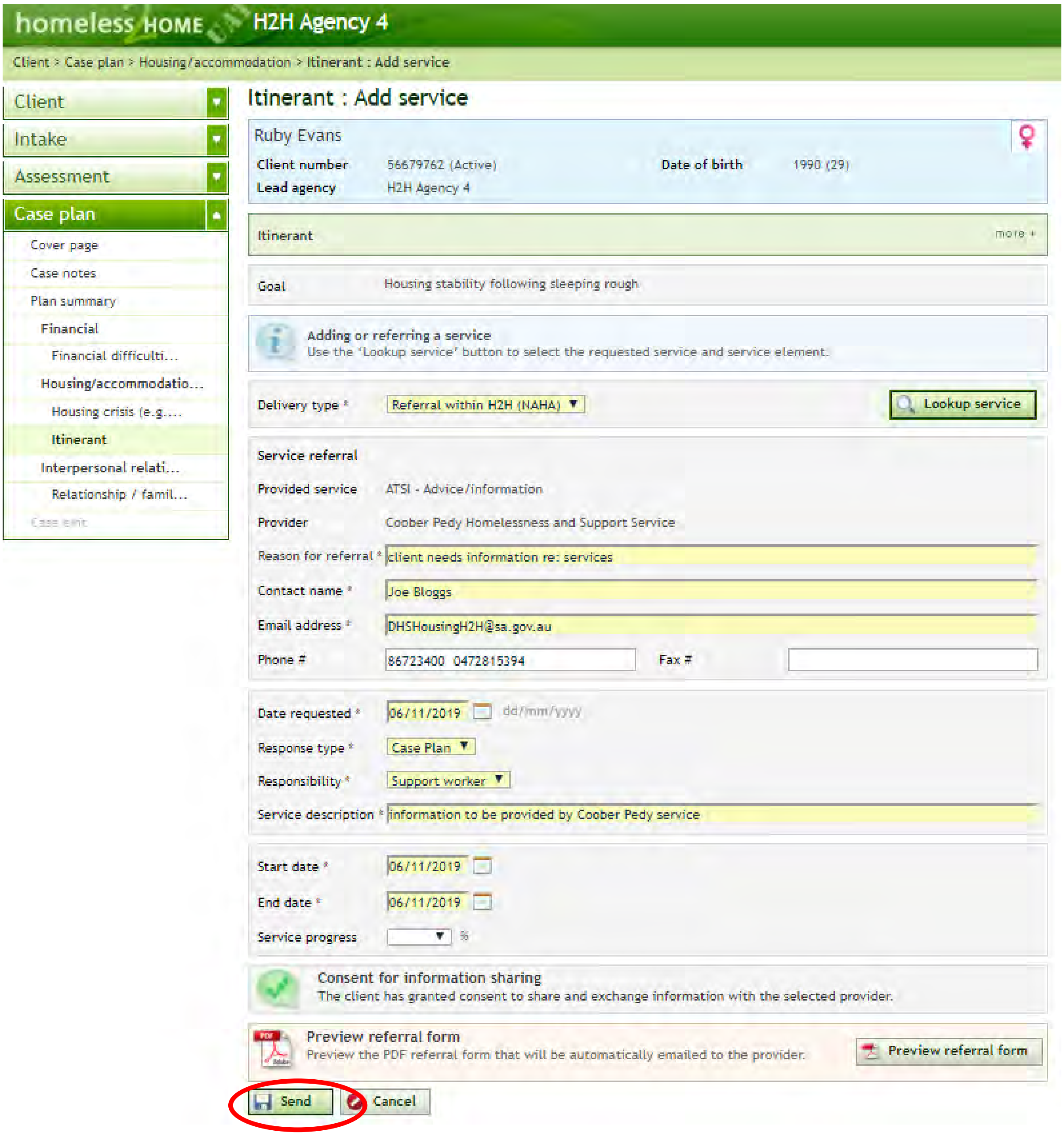
You will then be returned to the *add service* screen. The contact name, email address and phone number of receiving agency now pre-filled. These fields can be edited.

Complete the remaining fields and then click the *add consent* button located in the bottom right hand corner of the screen.

The *add consent* pop-up box will then appear (as shown below). Complete the consent type, agreement and expiry date fields and click the *save* button.

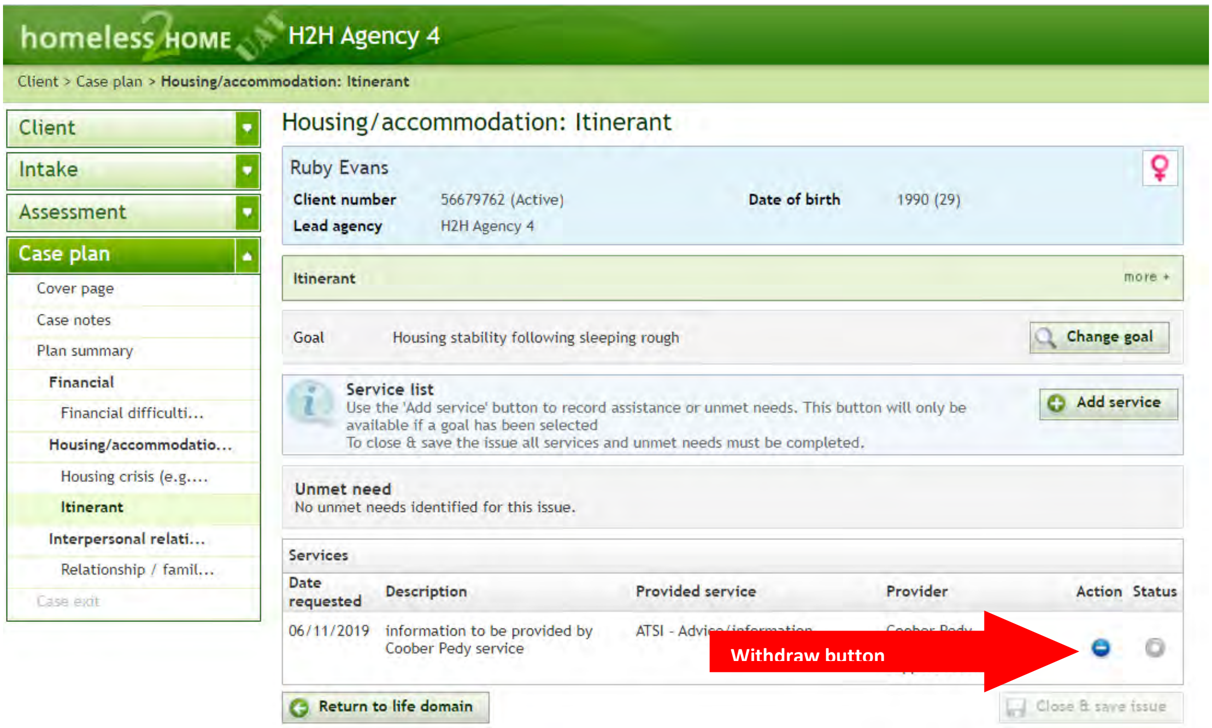


Once consent is added and all fields are completed, click the *send* button at the bottom of the page (as shown below). This will return you to the issue page.



The service referral will appear in the list of services with a status of *pending* until it is accepted by the receiving agency.

While the service is pending you can withdraw the referral by clicking the blue *withdraw* button in the *action* column (as shown below).



Note:

Once a service referral has been accepted, it is the responsibility of the provider (the consented agency) to save and close the service, or wait for it to close automatically once the end date passes

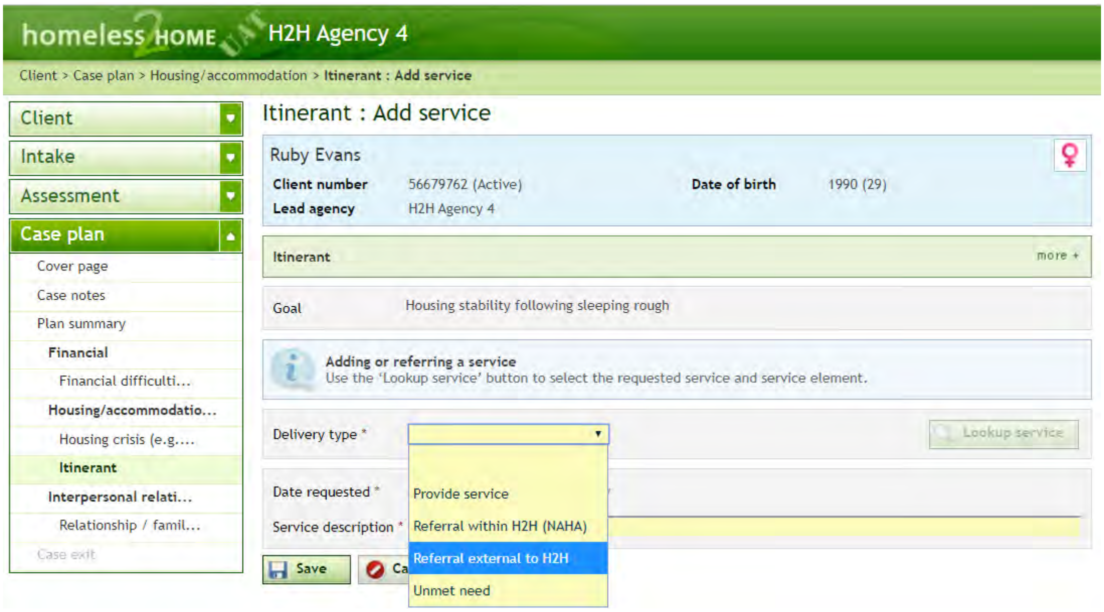
Referrals external to H2H

External referrals are used to record where the client is assisted by an agency who does not use H2H (e.g. mainstream services such as health, employment services, etc.)

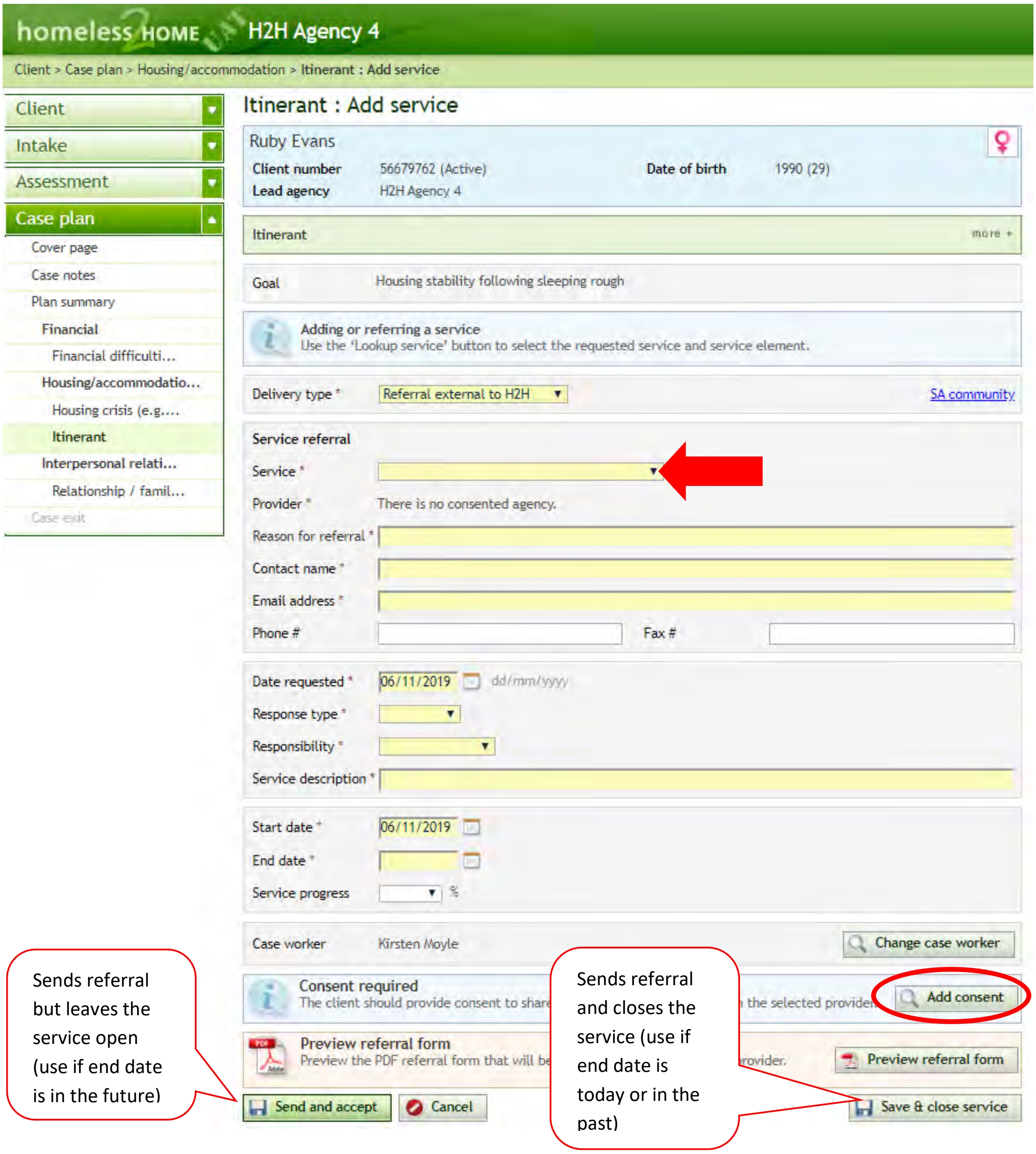
How to add an external referral

Similar to service referrals to internal agencies, you can record referrals to external agencies. External agencies are those that provide services to clients but do not use H2H and cannot accept referrals or view information through H2H.

Firstly, select 'Referral external to H2H' from the delivery type drop down box.



select the type of service from the 'Service' drop down box, and complete the remaining fields;



The next field is the 'Provider' field. If the agency you are referring to is listed select the agency, if not choose the '-------not listed-------'option.

> ***Note:***
>
> *The provider field will list any currently consented agencies. If you have not sent any referrals yet for this client, then no list will appear.*

Complete the 'reason for referral' section and enter the contact details of agency/worker you are referring to. Complete the responsibility, service description and the requested, start and end date fields.

If no current consent with the agency exists, click the *Add consent* button at the bottom of the screen and complete the pop-up (see consents for more information).

The referral is now ready to send. The send button is labelled 'Send and accept' rather than just 'send'. This is because you are sending an external referral to an agency that does not use H2H and cannot the referral within the H2H system. By pressing the *send and accept* button you are acknowledging that the provider has already assisted, or as has agreed to assist the client.

Unmet need – case plan

Aside from entering provided and referred services within H2H, you can record services that a client may need, but cannot be provided. If an unmet need can later be provided it can be converted to either a provided or a referred service.

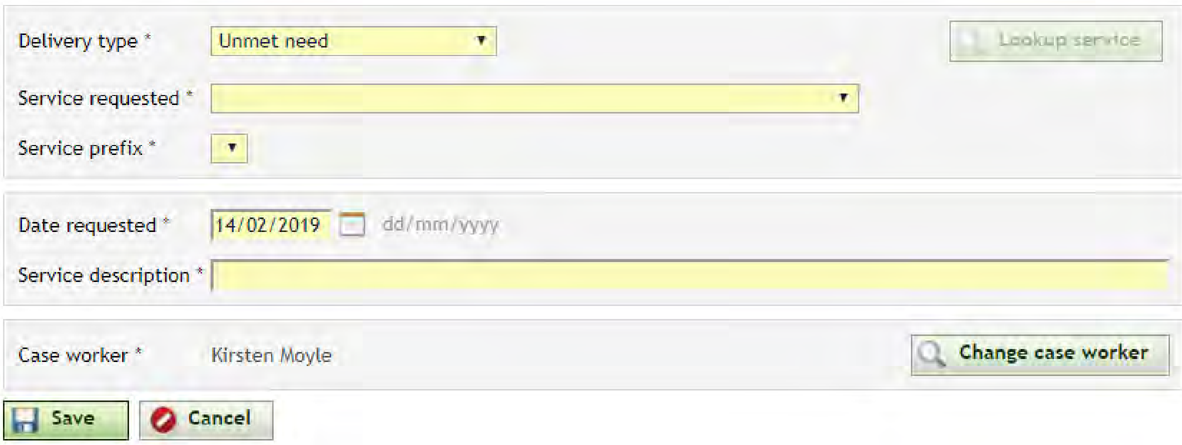
Unmet need should not only be entered when a client needs a particular service, but also when the client does not accept the offer of a particular service, e.g. a client with a drug issue who refuses assistance.

For further information on unmet need see the section in Presenting unit and services.

How to record an unmet need in case plan

Select the issue in the case plan where you wish to record the unmet need, then the *add service* button. Within the *Delivery type* drop down box select the *unmet need* option.

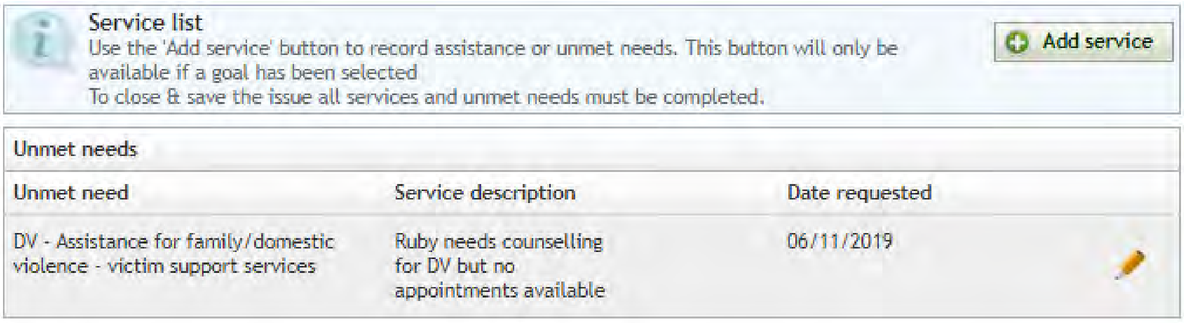
You will need to select the unmet need for the client, followed by the prefix. If the unmet need is for a service that your agency will eventually provide, select the prefix that matches your agency target group. If another SHS or an external provider will be providing the service in the future, select their corresponding prefix.



Example: if your client has just fled a violent relationship, and requires emergency accommodation but none is available, you may choose to enter an unmet need of **Short term/emergency accommodation, with a prefix of DV**

> ***Note**: Unmet needs that can be provided at a later point in time can be converted. The ability to convert is dependant upon the prefix chosen. Continue reading for further detail.*

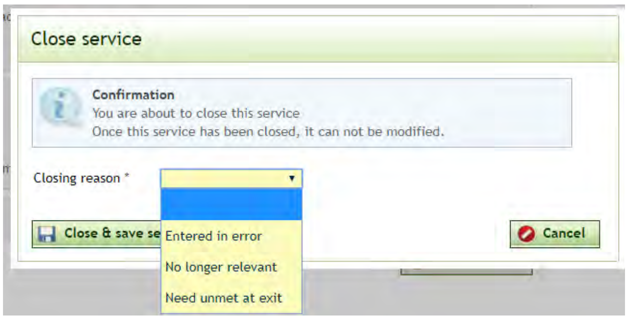
Complete the remaining mandatory fields, and select the save button. You will then be directed back to the issues page and the unmet need you entered will appear at the top of the page.



How to close an unmet need

If you have recorded an unmet need that was incorrect, or is no longer needed by the client, close it by clicking anywhere on the service to open it.

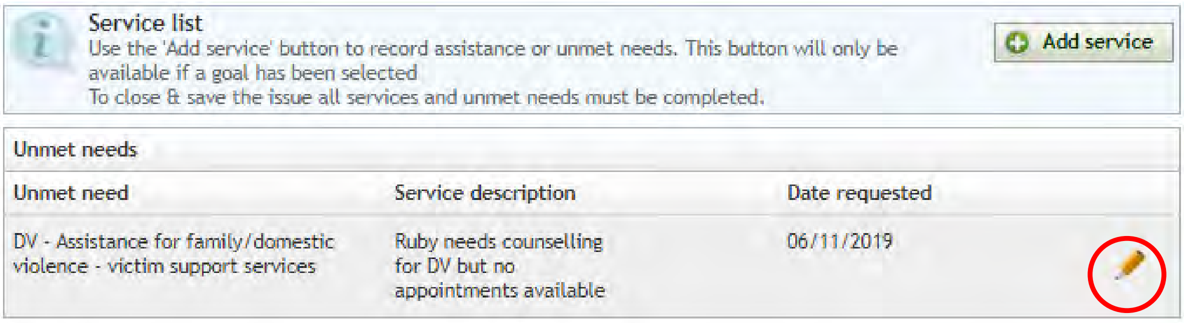
Select the 'close and save' button and record the reason you are closing the unmet need.



Converting an unmet need to a provided or referred service

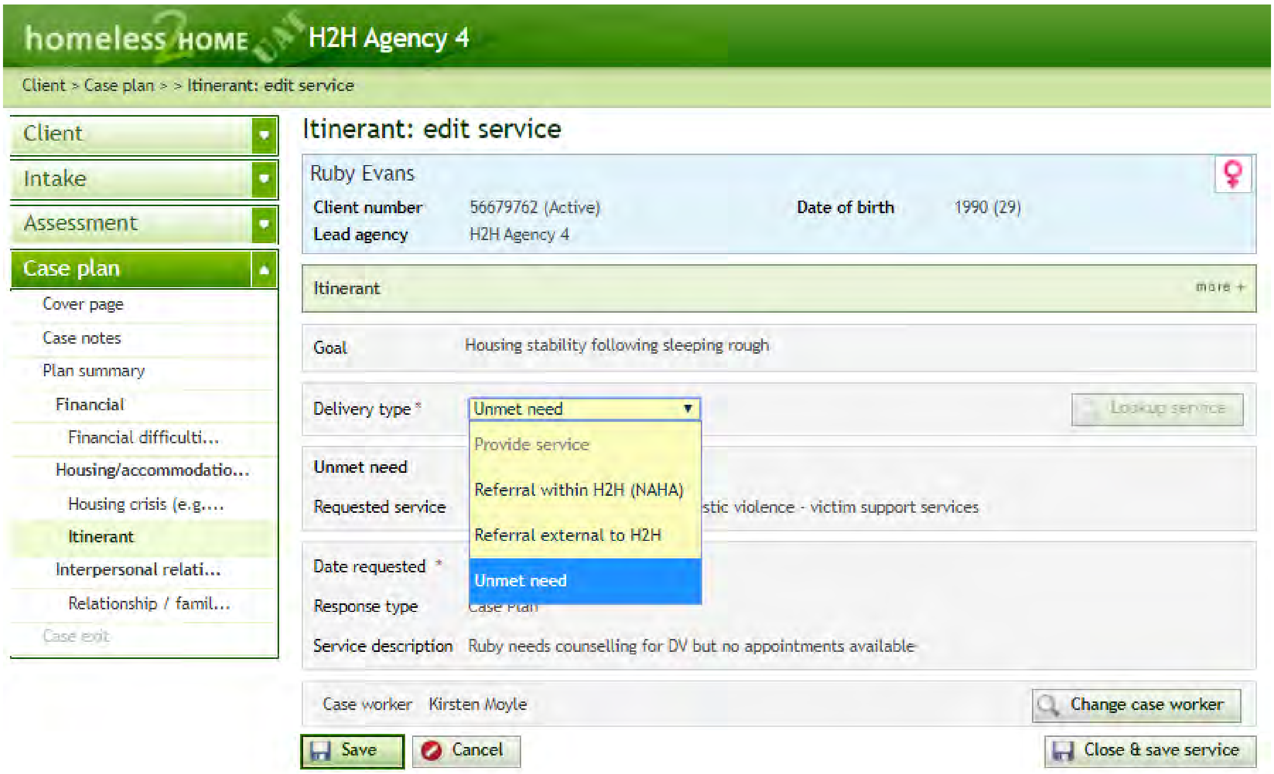
If you are now able to meet the need for your client, you can convert the original unmet need to either provided or referred. This indicates that a need that had once been unmet, is now met.

To convert an unmet need, click on the edit pencil at the end of its row on the issue screen. This will take you to the 'edit service' screen. This will enable you to convert the service using the 'Delivery type' drop down menu (as shown below).



This will take you to the *edit service* screen. Convert the service using the *Delivery type* drop down menu.

When converting an unmet need, you may be restricted in your choice of delivery type. This is indicated by a choice within the menu being greyed out (as shown in the screenshot below). A delivery type might be greyed out if your agency does not provide this service.



Example: In the above scenario, the client needed assistance for family/domestic violence**.** When attempting to convert the only option is to refer the service, either internally or externally. It cannot be converted to a provided service because the current lead agency is a generic (GEN) agency and not funded to provide DV services.

What can I do if I cannot convert the unmet need to a 'provided service'?

As in the example above, if you have entered an unmet need that you cannot covert to a provided service it means that you have chosen a service that your agency is not funded to provide. In this case, you can either:

- *Delete the original unmet need and re-enter it with a Prefix that your agency provides (e.g. 'Gen' for generic funded agencies)*
  or
- *Convert it to a service referral*

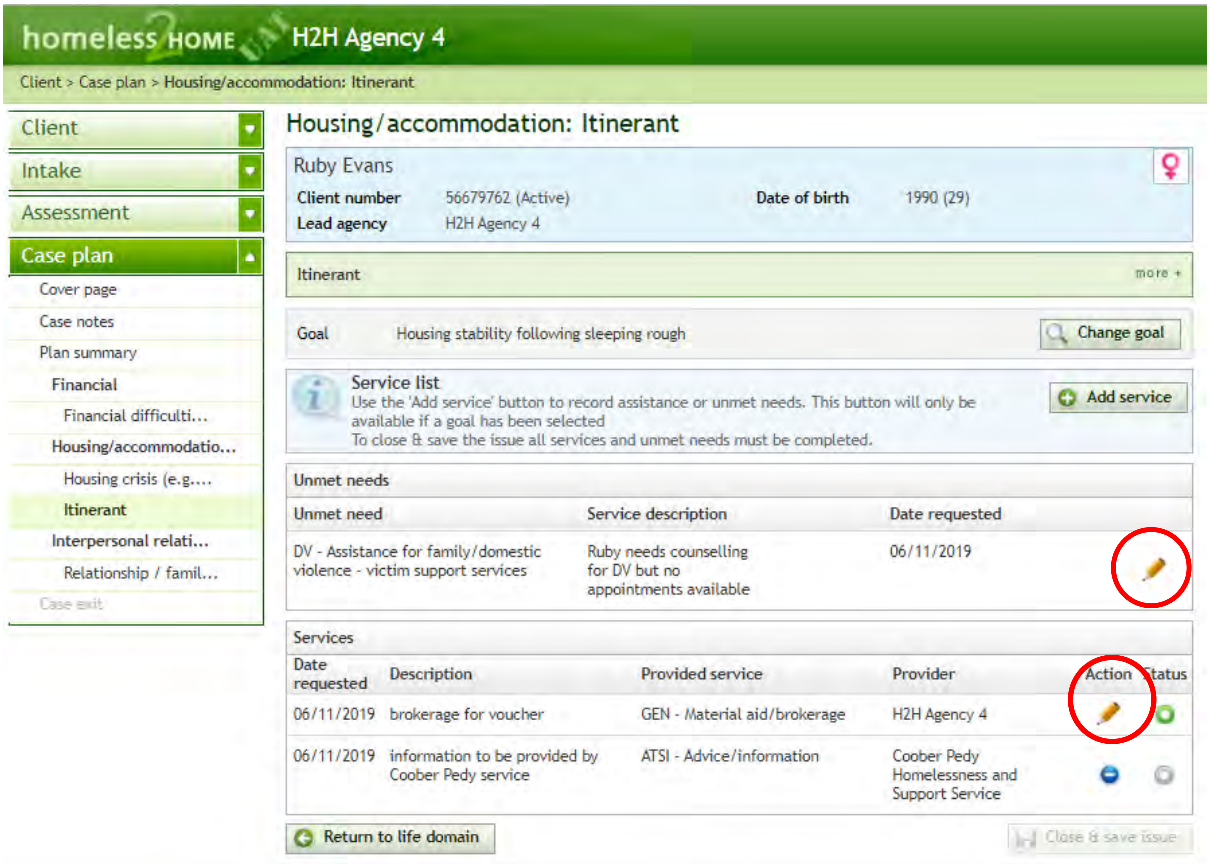
Once you have established the delivery type you will be converting to, select it from the delivery type drop down, complete all mandatory fields, and save the service. You will be returned to the issue page and see that the unmet need has been converted to the newly created provided or referred service in the service list.

Other functions

Editing a service

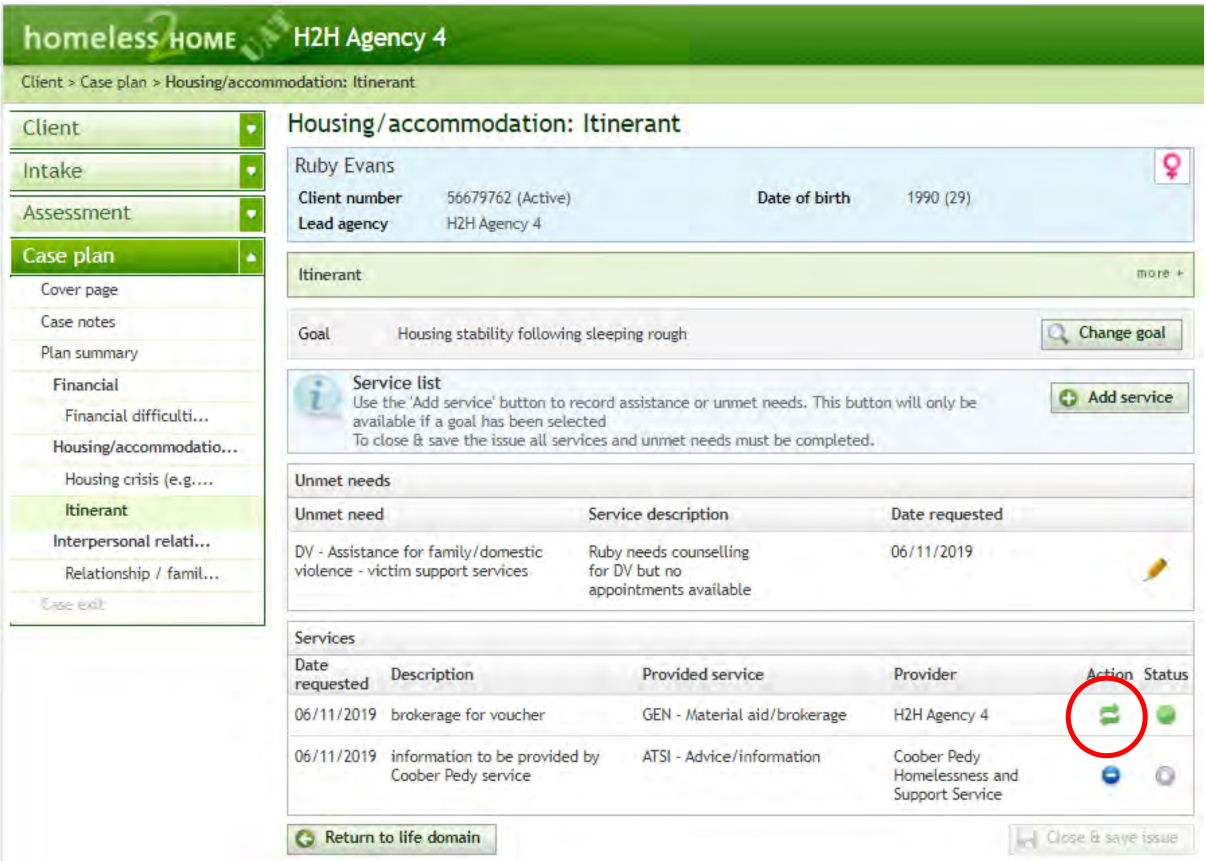
To edit any service or unmet need, click the issue screen that contains the relevant service and click the corresponding edit pencil (as shown below).

Only open services can be edited. Referred services that are pending or closed services will show a different icon.

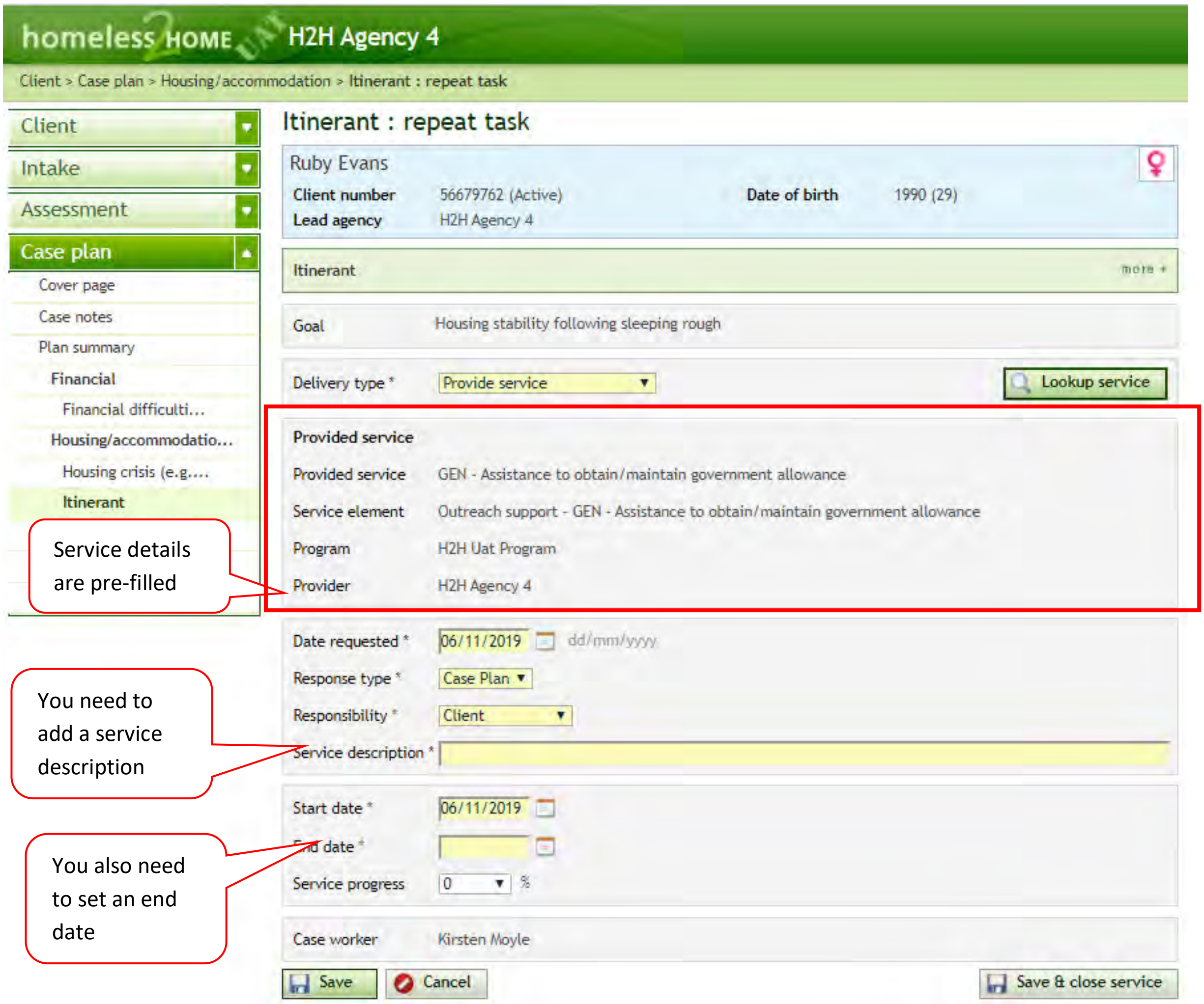


Repeating a service

Once a service is closed the *repeat* button becomes available. This button is a quick and simple way to repeat a service that has been previously entered. To repeat a service, click the repeat icon

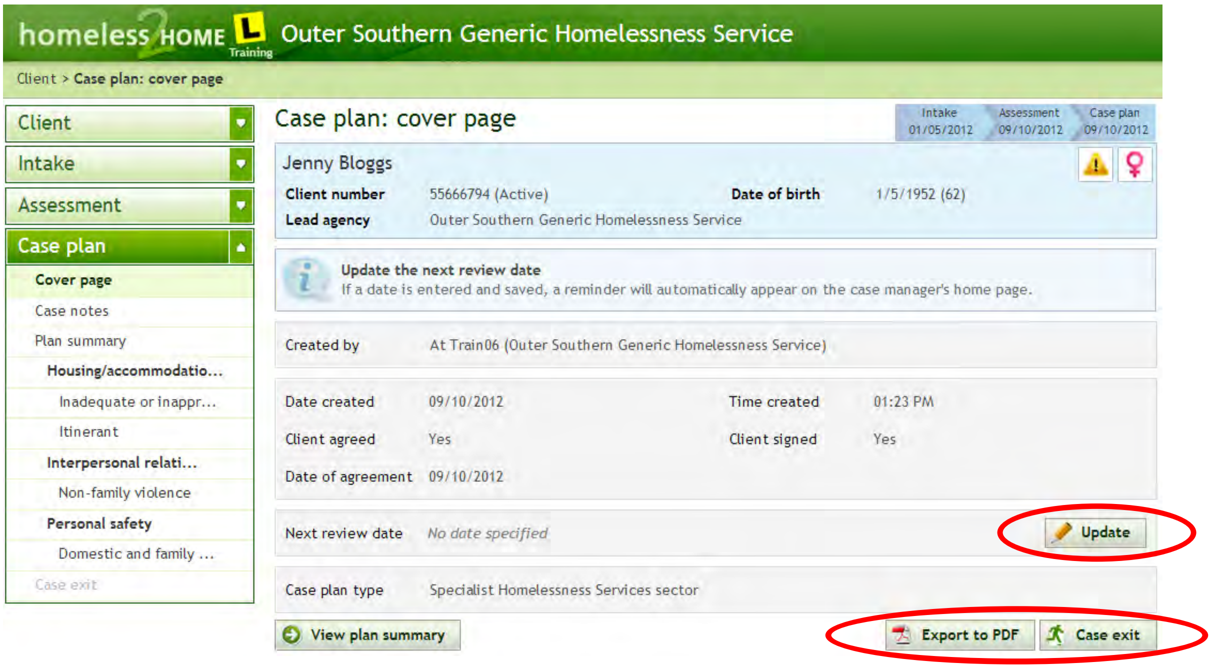


You will then be directed to a *repeat service* page. The page is pre-filled with most of the details of the service being repeated. All that is required to complete is to add a service description and end date and click *save* or *save and close.*


homeless HOME H2H Agency 4
Client > Case plan > Housing/accommodation > Itinerant : repeat task
Client
Intake
Assessment
Case plan
Cover page
Case notes
Plan summary
Financial
Financial difficulti...
Housing/accommodatio...
Housing crisis (e.g....
Itinerant
Itinerant : repeat task
Ruby Evans
Client number 56679762 (Active)
Date of birth 1990 (29)
Lead agency H2H Agency 4
Itinerant
more +
Goal Housing stability following sleeping rough
Delivery type * Provide service
Lookup service
Provided service
Provided service GEN - Assistance to obtain/maintain government allowance
Service element Outreach support - GEN - Assistance to obtain/maintain government allowance
Program H2H Uat Program
Provider H2H Agency 4
Date requested * 06/11/2019 dd/mm/yyyy
Response type * Case Plan
Responsibility * Client
Service description *
Start date * 06/11/2019
End date *
Service progress 0 %
Case worker Kirsten Moyle
Save
Cancel
Save & close service
Service details are pre-filled
You need to add a service description
You also need to set an end date

The Case plan Cover page

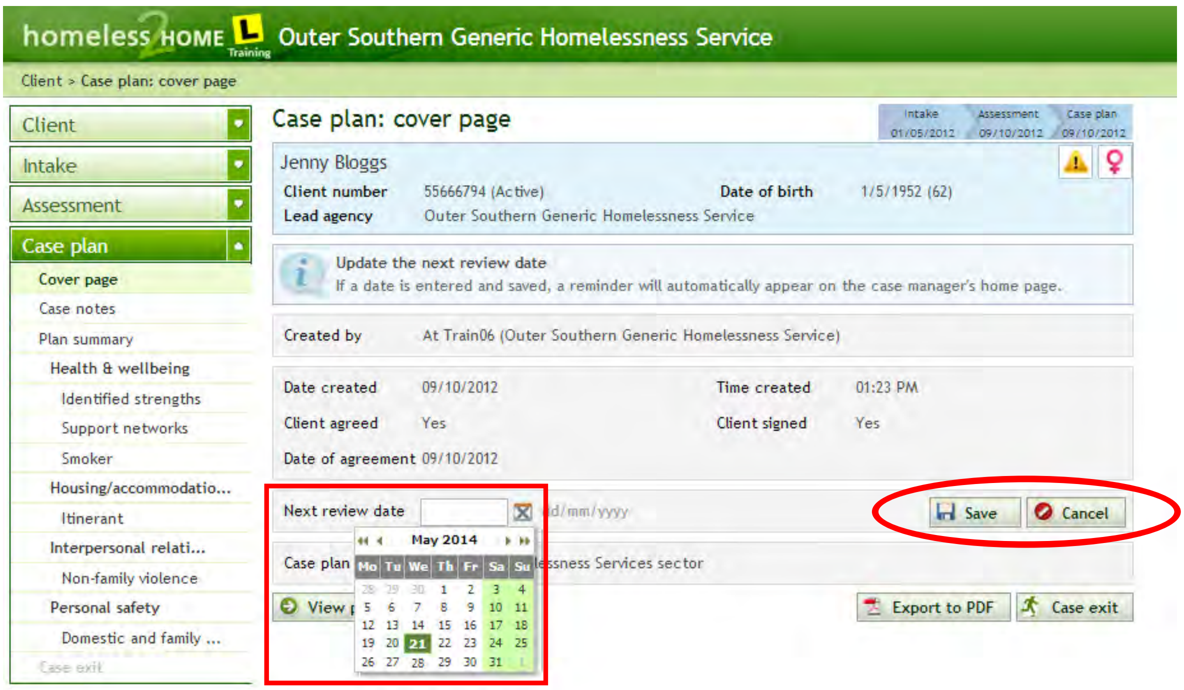
The case plan cover page allows you to view details regarding a case plan such as who created it and the date and time it was created. From this page you can also print your case plan and case notes, set review date reminders and create a case exit. Further details about exiting your client from case plan can be found in the *end support/case exit* section.



Setting a review date

To set a case plan review date, click the *update* button on the case plan cover page. You will notice the screen change to include a date field and *save* and *cancel* buttons. Click the calendar icon, select a date and press the *save* button (as shown below).

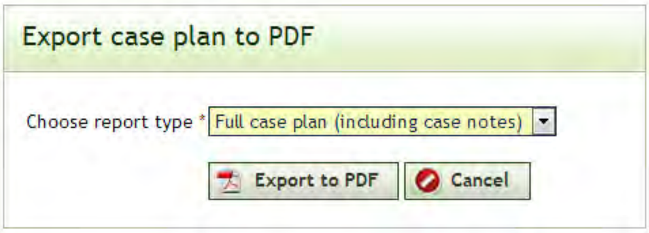
Setting a review date will prompt you to review your case plan by providing a reminder on your home screen.



Printing a case plan and case notes

H2H provides the ability to view your case plan for printing. This can be done with or without your case notes attached.

To view your case plan in PDF format, click the *export to PDF* button found on the case plan cover page. The following pop-up box will be displayed.



Choose the type of report you want to print (Full, summary and with or without case notes) and click the *export to PDF* button. This will generate a PDF version of your selection. To print, select the print option in your PDF reader program.

Creating a case exit

For information on the case exit function, refer to the end support / case exit section.

Case Notes and Service Notes

The case notes page is where you can enter case or service notes on your client record. A case note is a generic note that is in relation to the case management of your client, and a service note is a note that is attached to a specific service in your case plan. Notes can also be entered from the notes screen in the client menu. See the notes section for further detail

Case notes belong as part of the case plan and therefore can only be entered or read and by workers within the lead agency who have access to the case plan.

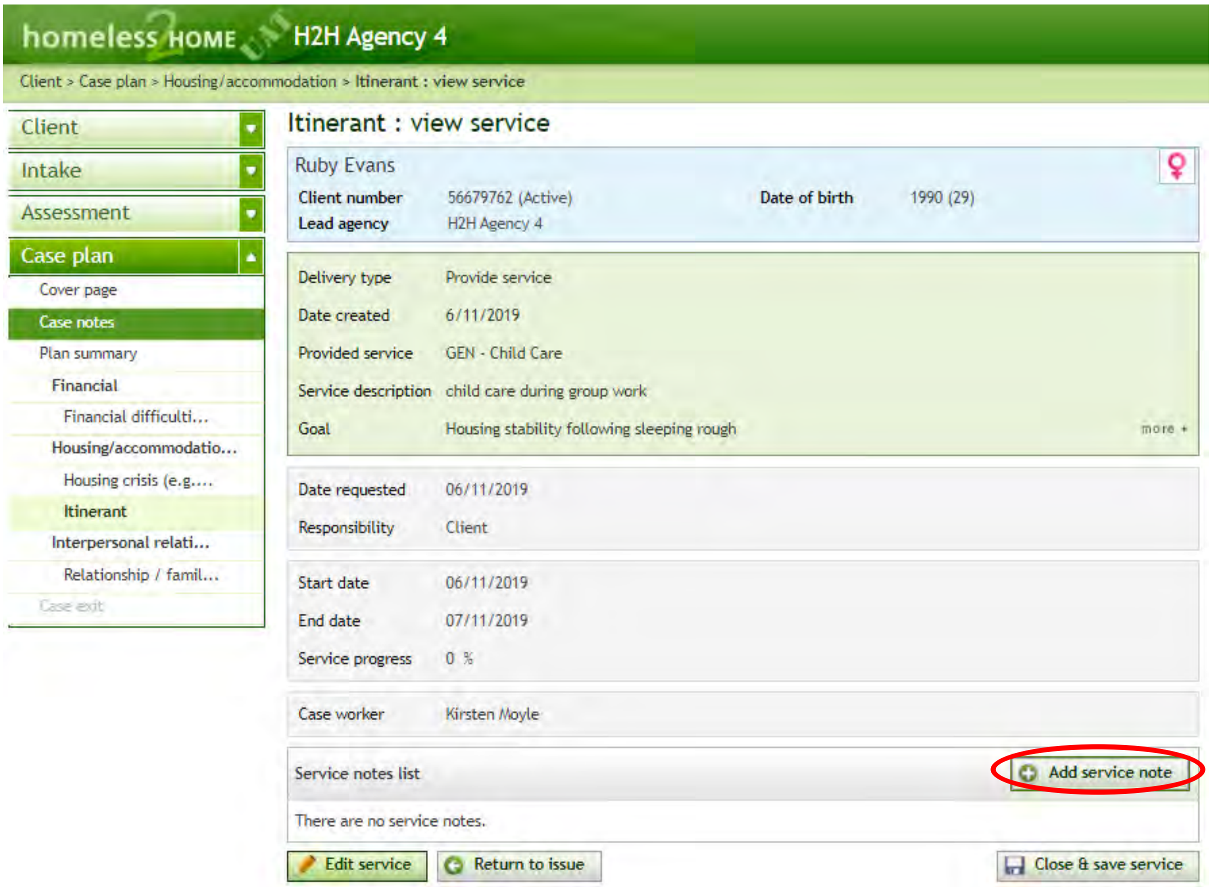
> ***Note:***
>
> *Once saved, notes cannot be edited or deleted.*

Service notes can be written by a consented agency where they have assisted a client as a non-lead agency, or by the lead agency. Unlike case notes, service notes can be added from two places in the case plan. See below for instructions on how to enter a both types of notes.

Adding a service note

A service note can be entered on the case notes page, or from the service in the case plan.

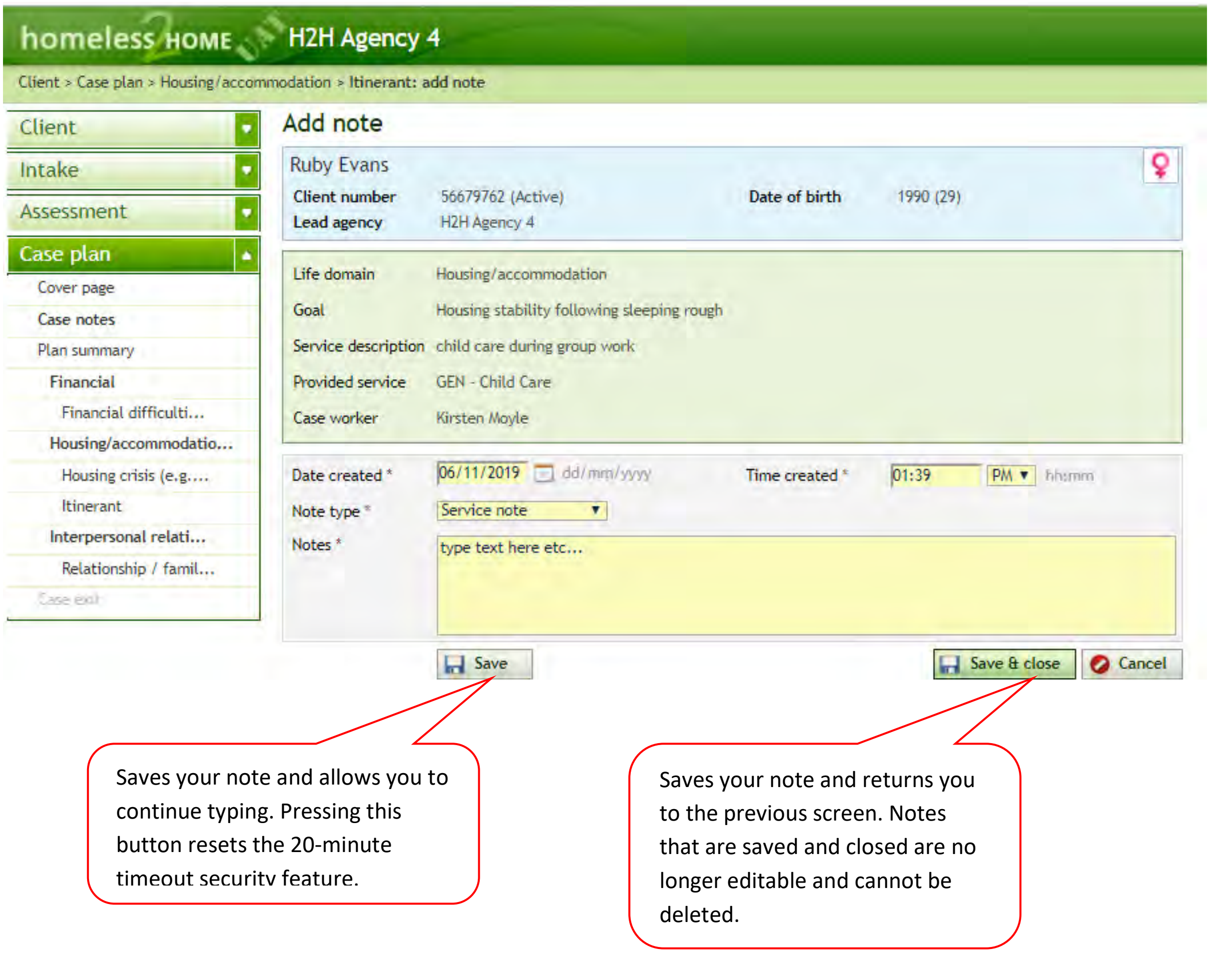
To add from a case plan service, click the service and then click the *add service note* button found at the bottom of that page (as shown below).



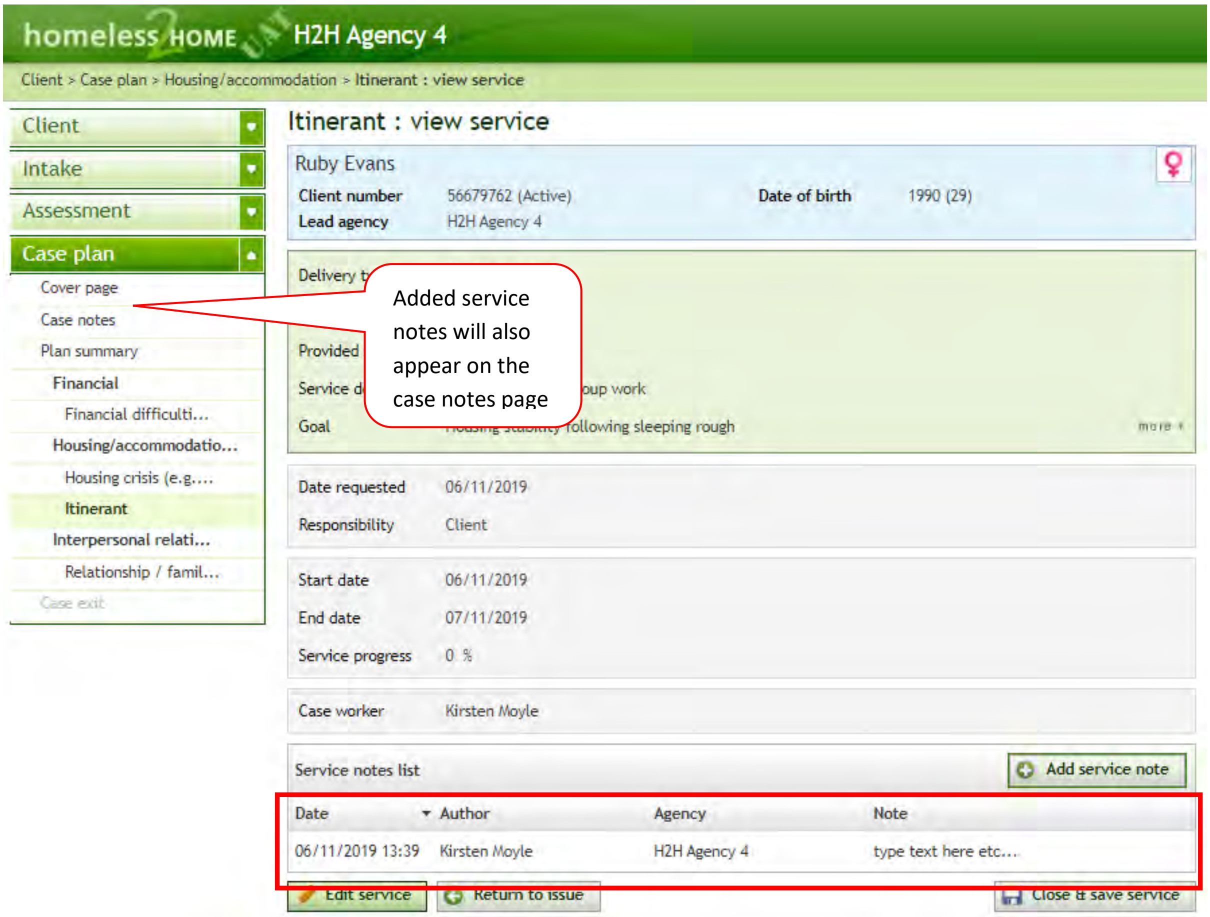
Next, set the date and time and write your note, press the *save and close* button to return to the previous screen.

Saving your note – system timeout

For security reasons H2H has a 20 minute timeout feature. If no button within H2H has been clicked for a period of 20 mins the timout feature will activate and you will be logged out of the system. As a result any unsaved service and case notes will be lost.

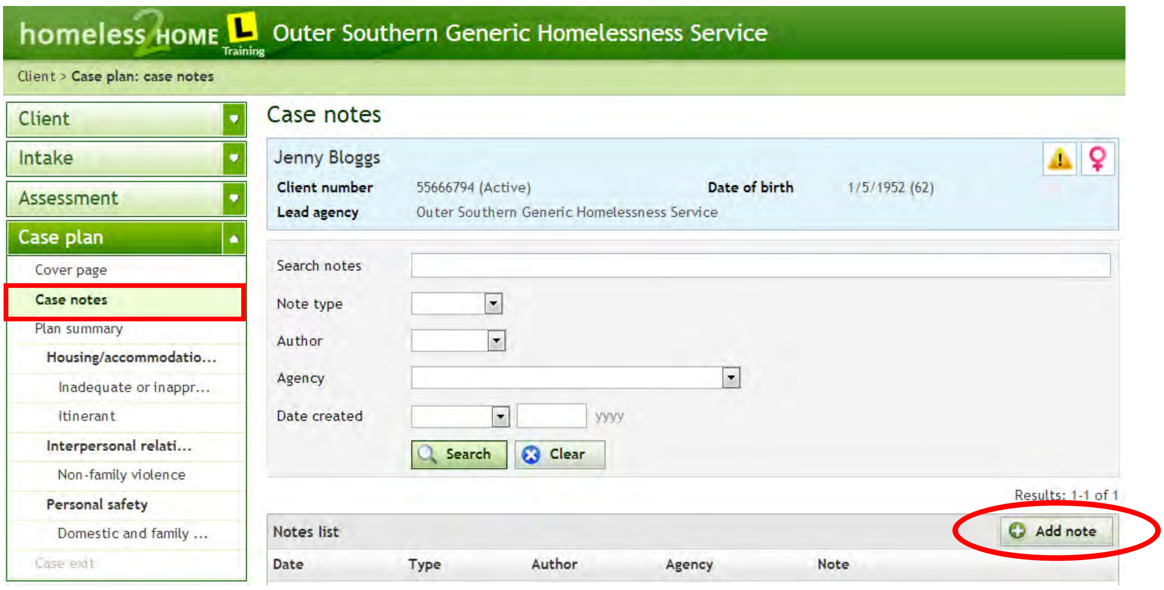


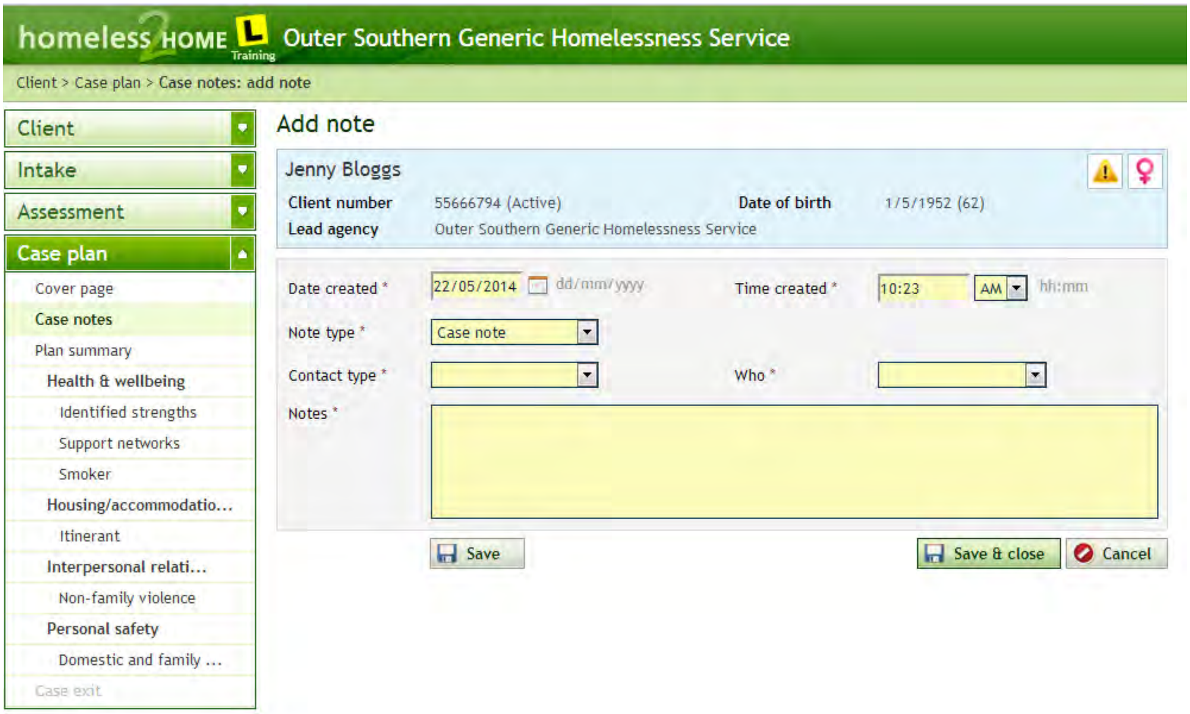
All service notes will appear in order underneath the service on the relevant *view service* screen (as shown on next page). Service notes also appear in the notes list within the *Case notes* page, and on the *notes* screen in the client menu.



Adding a case note

Case notes are added through the *case notes* page in the case plan menu by clicking the *add note* button.





Enter the date/time, type of note, contact type and who was involved and write your note, press the *save and close* button this, returns to the previous notes page. The same 20-minute timeout feature applies to case notes as elsewhere in H2H therefore ensure you save your note often to avoid losing your work.

> ***Adding a service note from the case notes screen***
>
> *Service notes can also be added from the case notes screen by selecting service note in the note type drop down box and joining it to a service by completing the relevant fields that appear.*

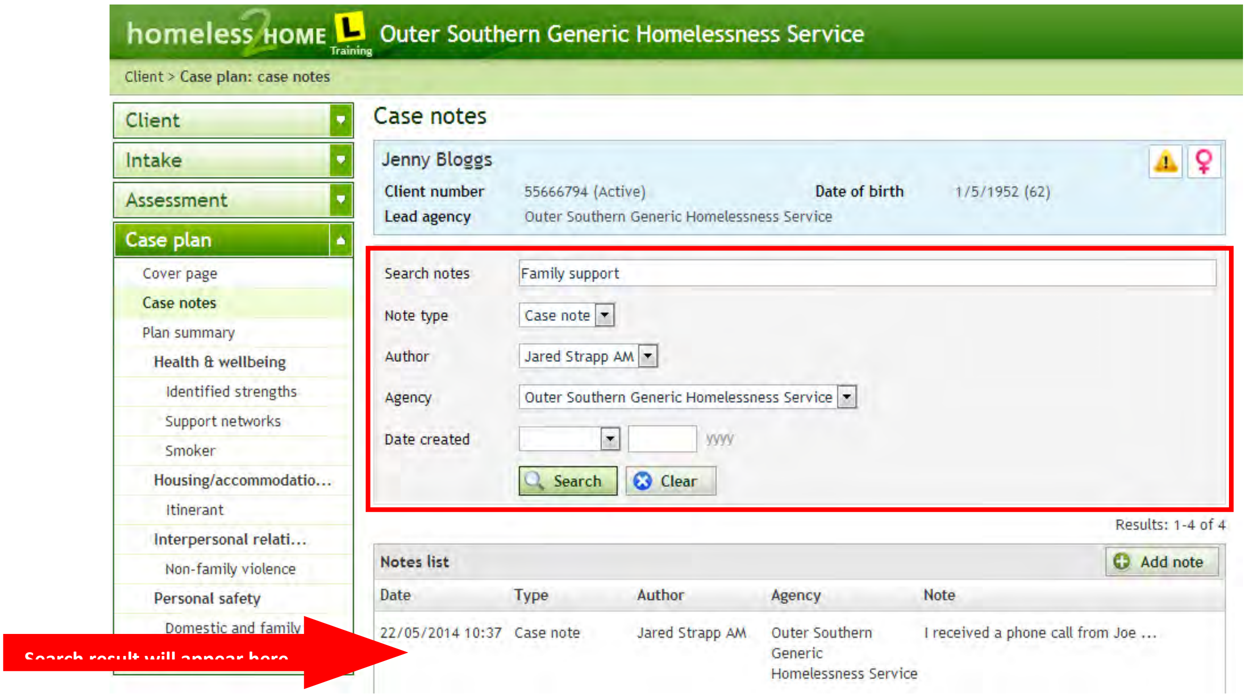
Searching notes

At the top of the case notes page there are various search fields that can be used to locate historical notes previously entered onto H2H. You can use these fields to return search results based on your criteria.

You can search by the type of note, author, agency and/or the month and year it was written.

Entered your search criteria, click the '*search*' button. Search results will appear directly underneath. If no search results are found, the screen will display 'there are no notes for this client'

On the following page there is an example of the various fields that can be used for searching.

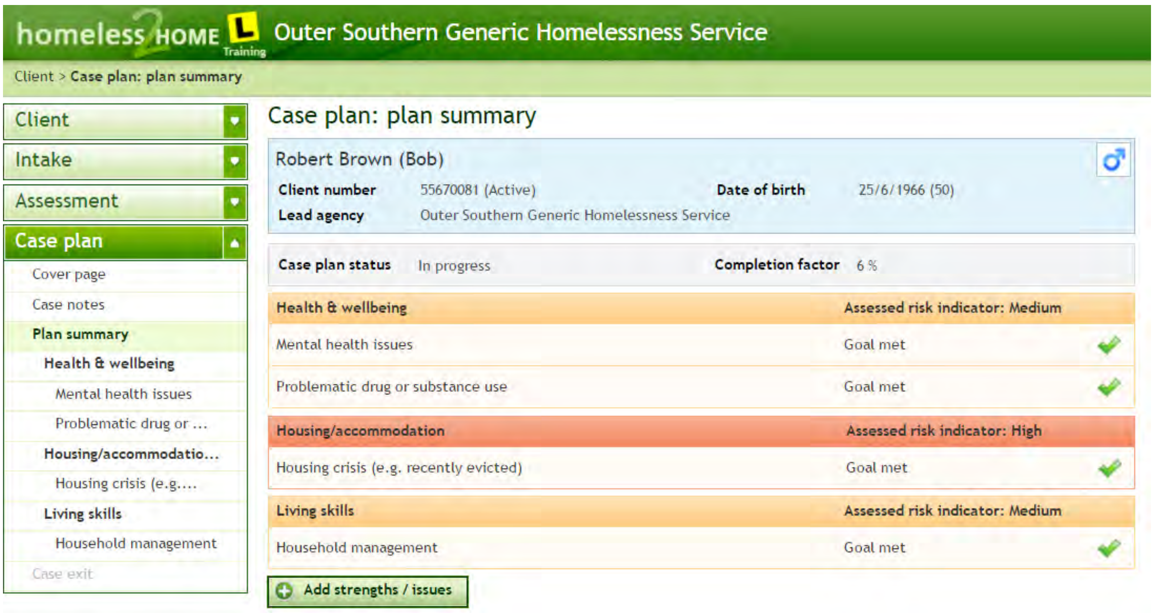


Closing the case plan

To create a case, exit for your client you must:

- Close all open services
- Check all referred or consented services are accepted and closed – if not contact the consented agency and ask them to close any outstanding services
- Close all issues

A case plan that is ready to be closed should look similar to this;



Once each issue (and its corresponding goal) has been closed, you are ready to close your client record.

homeless2HOME

System Close, End Support & Case Exit

System Closes

Clients records with no activity for more than one calendar month (over 30 days), are at risk of being closed automatically by the System close function.

The system close function only operates on clients without a case plan, with a status of Casual or assessed. At the end of the month, these clients will be automatically closed by the system and their record set to inactive. This type of closure is known as a 'System Close'

'Activity' consists of adding a service, or completing a pathway item (such as creation of an intake or assessment)

> ***Please Note****:*
>
> *For casual or assessed clients that are closed by 'System close', an exit will be automatically completed. All fields within the exit will be set by default to 'don't know'. These types of exits are visible in agency reporting outcomes and are monitored closely as part of agency performance management. System closes should be avoided wherever possible by monitoring the home page carefully.*

You can avoid system closes by regularly check the 'clients without activity' item in your inbox

Exiting a client

Once support of a client has ended the client record on H2H needs to be closed off to make the record inactive. You will need to update information about the client's circumstances at the end of support. To do this you need to either complete an 'end support' or 'case exit'.

> ***Note****:*
>
> *Always ensure you have as much detail as possible about your client's circumstances on exit. Accurate end support/case exit information is crucial to rerecording outcomes for the client*

End support is used where the client has a status of either casual or assessed (they have had an intake or assessment).

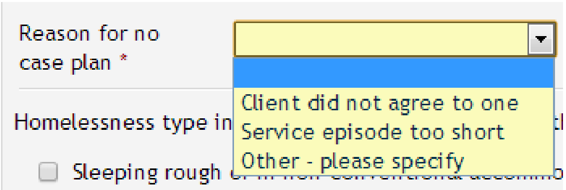
Case Exit is used to exit a client who has a case plan.

Differences between end support and case exit

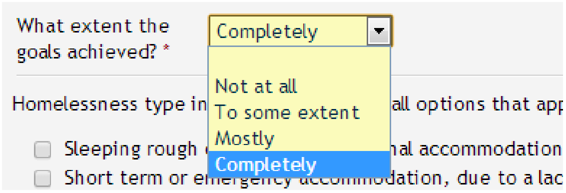
The End support and Case exit functions are identical except for one question.

Within an End support you are asked the reason why no case plan was created, in Case exit you are asked to what extent were the clients goals achieved.

End Support



Case Exit



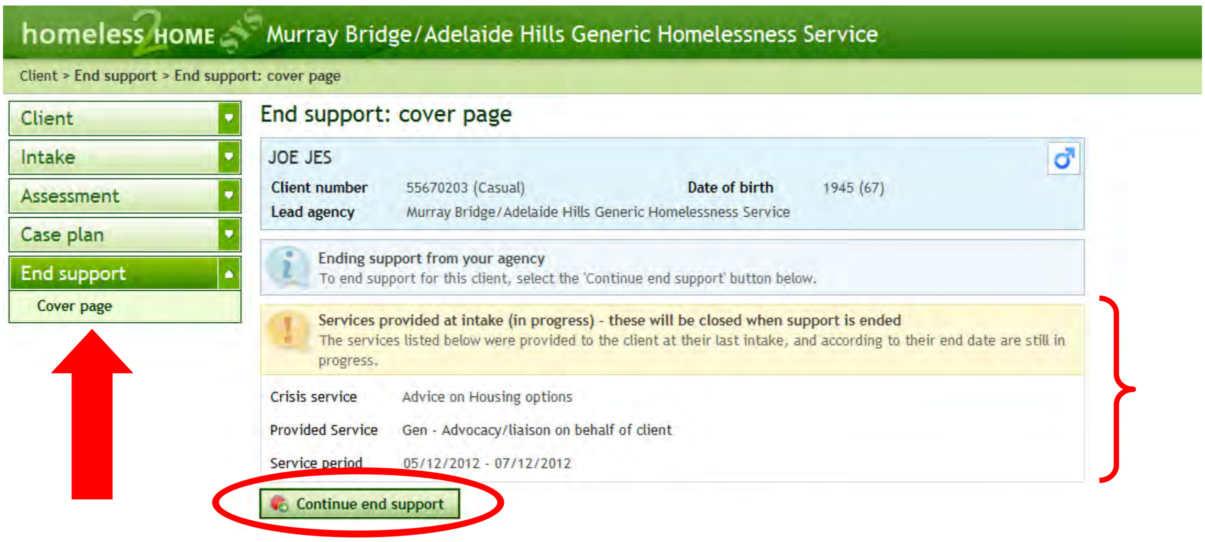
Starting an end support or case exit

The end support can be completed at the following stages:

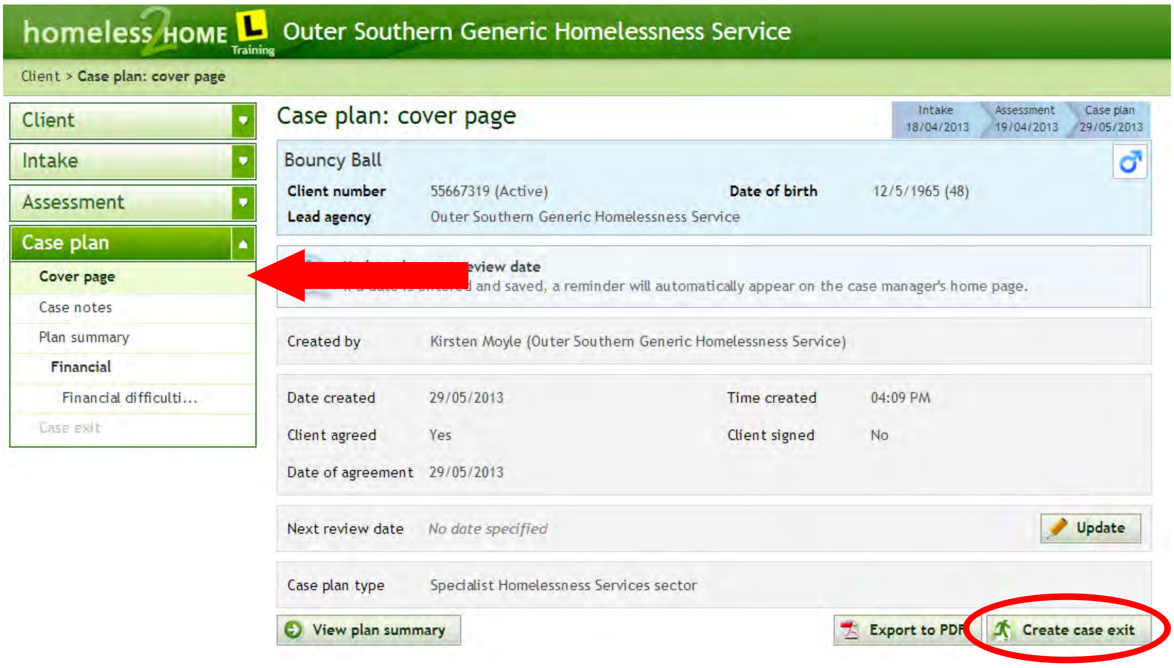
- After an Intake has been completed and one or more services provided (either by the Lead Agency or referred to another agency)
- After an Assessment has been completed regardless of whether a service was provided or not

> ***Note**:*
>
> *If a client has a current case plan, the 'End support' function will not be available. Instead, use the Case exit function*

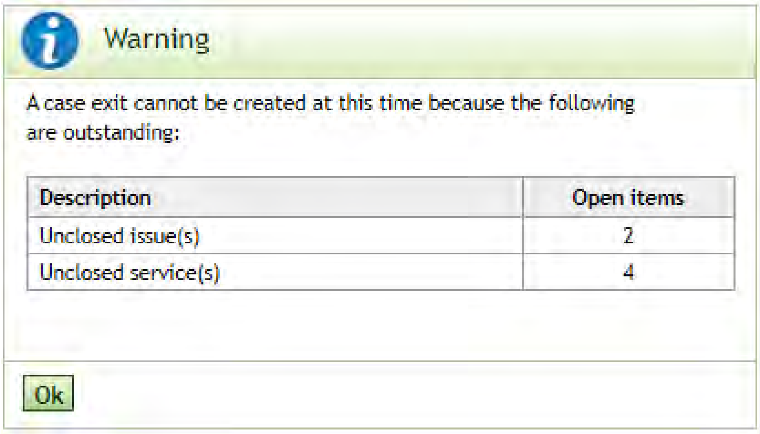
When clicking on *End support* you will be taken to the cover page. On this screen the system will advise you if there are any outstanding services or assessments in progress. If you choose to continue with the end support all outstanding items will be closed.



The case exit function can be found at the bottom of the case plan cover page (as shown below).

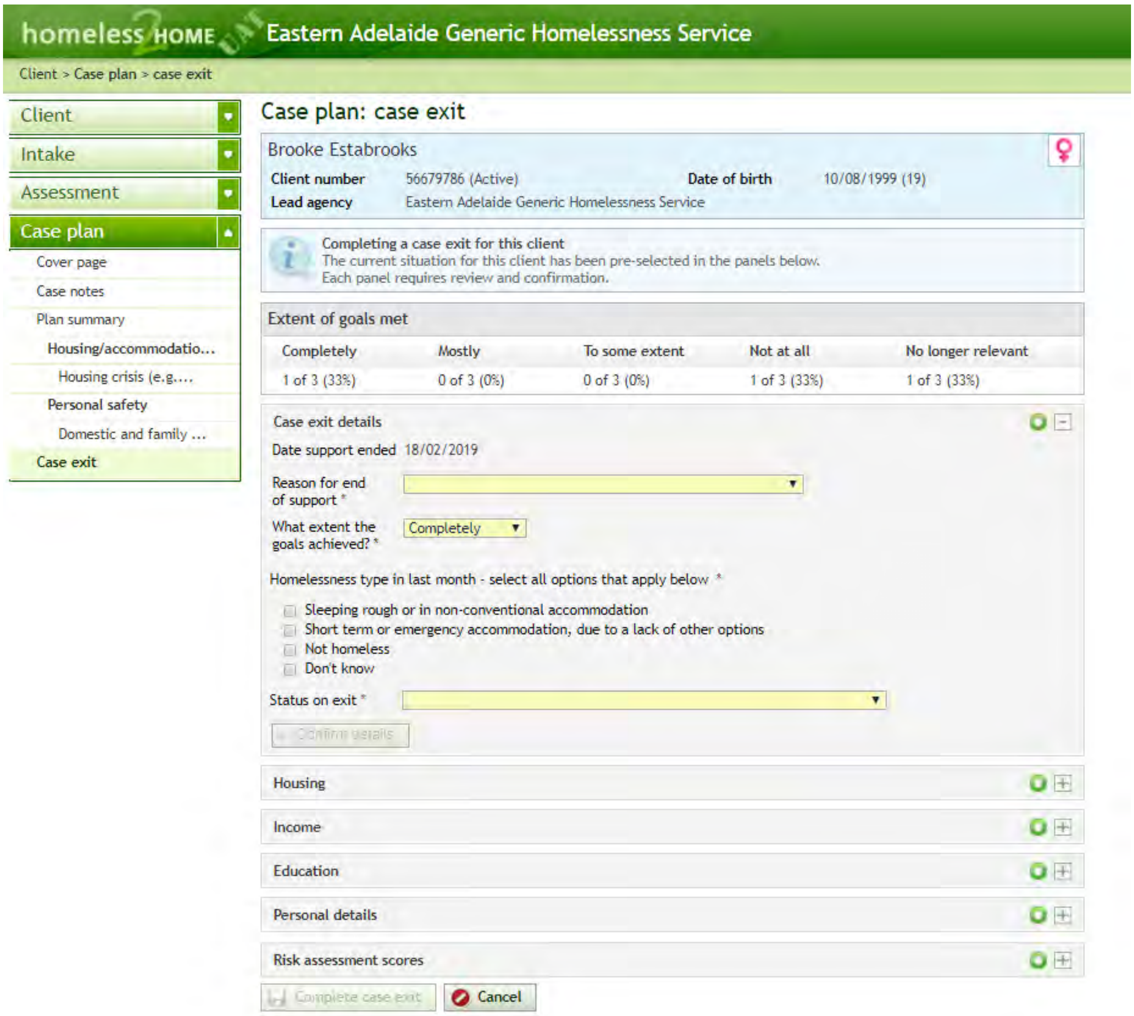


If you click the *case exit* button and receive a warning message advising that you have unclosed issues or services return to the case plan and close the outstanding items before you can continue.

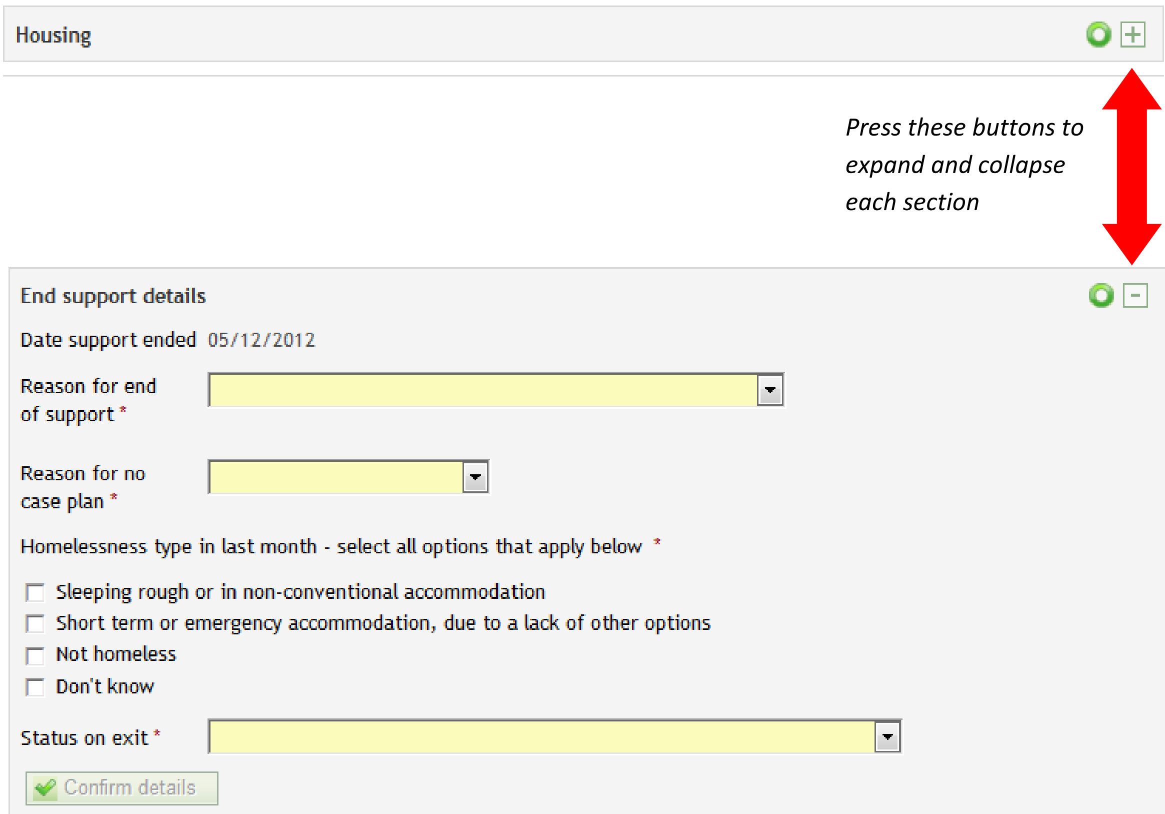


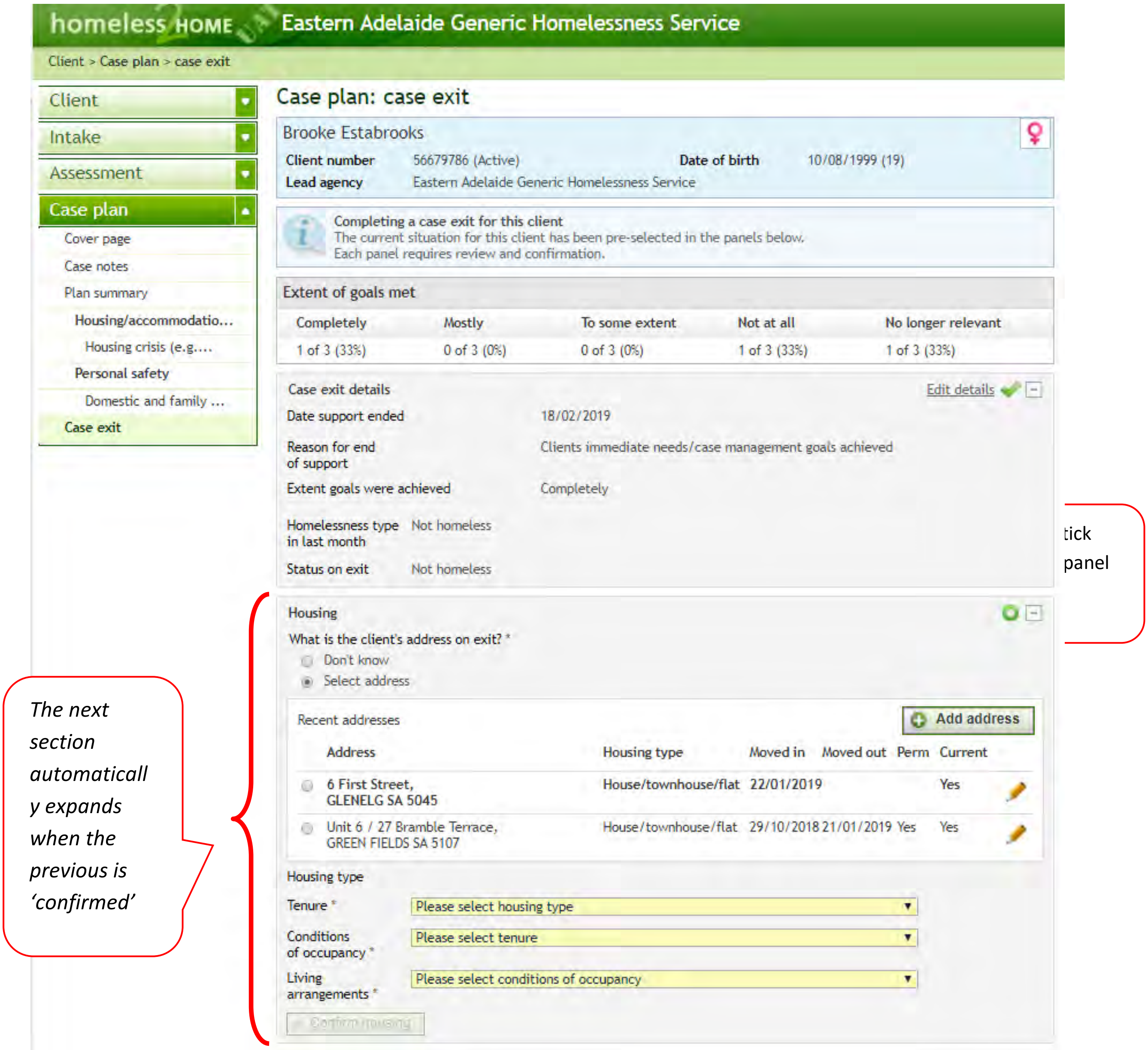
Working through an end support or case exit

Once you commence an end support or case exit you need to enter information on the client's circumstances at the end of the support period (the 'end support' panels). The information required is similar to the intake, and includes the client's homelessness status, housing, income, education, personal details, and risk assessment scores. A case exit will also display a summary of the client's goal achievement throughout the case plan.



The end support/case exit is divided into five sections, the first is 'open' while the remainder are 'collapsed'. To open or collapse a section click on the + or – button (as shown on the next page).

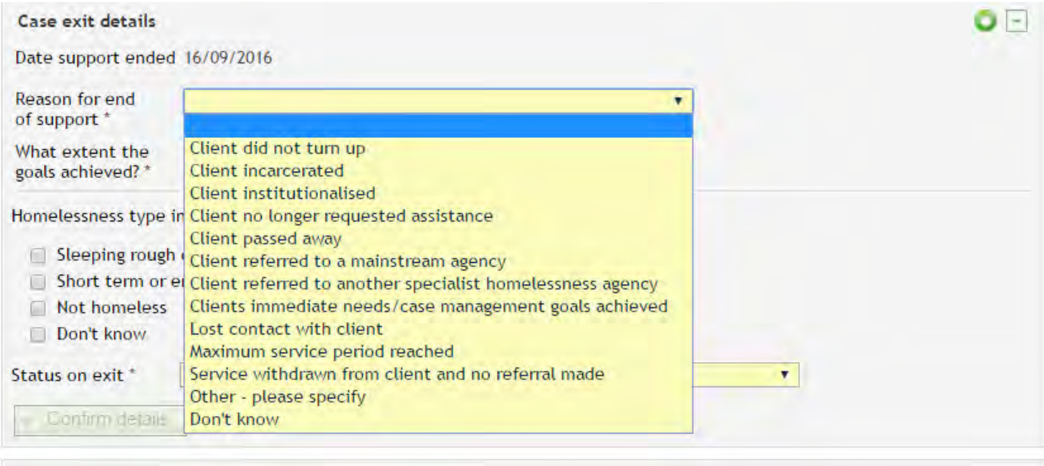




The *confirm* buttons on each panel will be greyed out and not available until all the mandatory fields in the section are completed.

End support/case exit details

For both end support and case exit you will need to indicate why the support with the client is ending.



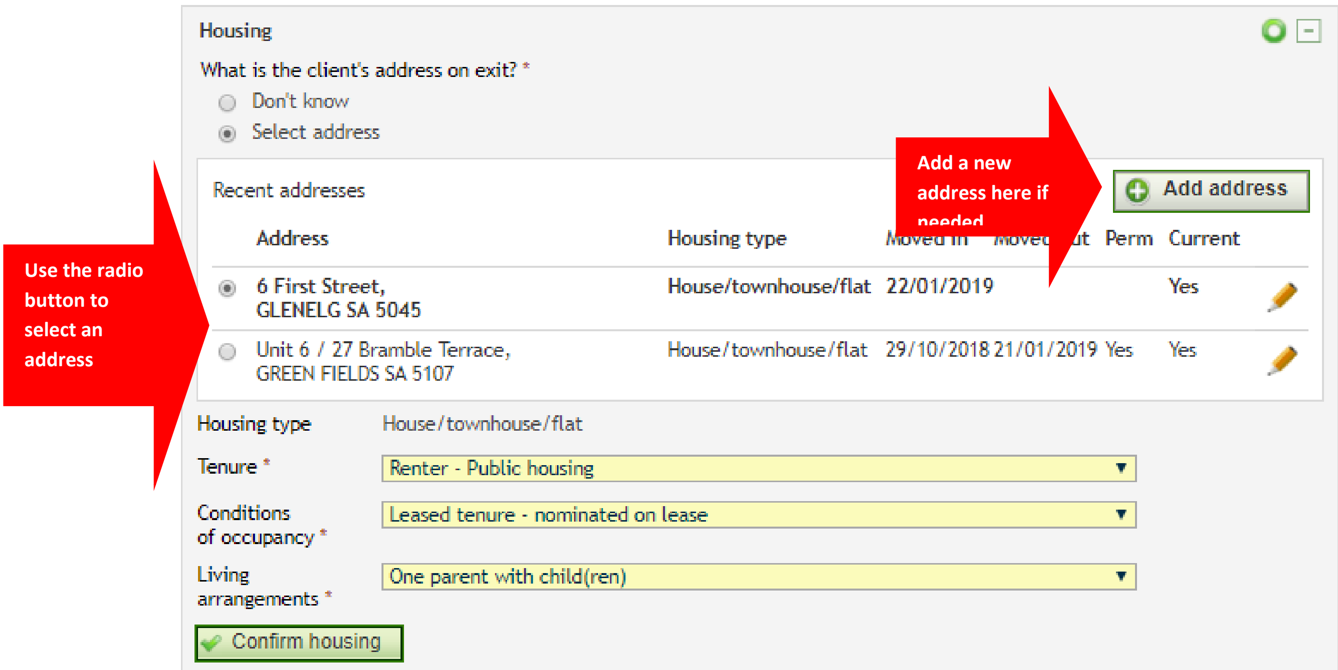
Reasons for end support definitions	
client did not turn up	the client had a further appointment with the agency and failed to show up
client incarcerated	the client has been placed in a facility of which the main role is to detail and rehabilitate either adult prisoners, or youth/juveniles, and as a result the client no longer requires a service, or the service can no longer be provided to the client
client institutionalised	the client has been placed in an institution, either voluntarily or involuntarily, such as a rehabilitation facility or psychiatric ward of a hospital, and as a result, the client no longer requires a service, or the service can no longer be provided to the client.
client no longer requested assistance	the client may have decided they no longer required assistance, or they may have moved from the state/territory or regions. Do not select if the client was referred to another specialist homelessness agency.
client passed away	the client died during the period they were receiving assistance from your agency
client referred to a mainstream agency	the client was referred to an agency other than a specialist homelessness agency and no longer requires support from your agency
client referred to another specialist homelessness service (available for case exit only)	the client was referred to another specialist homelessness agency
client immediate need/case management goals achieved	the client no longer requires support because their immediate needs have been met and/or case management goals have been achieved

lost contact with client	the client may have moved on without notifying the agency. Close the support period if you have not been able to successfully contact the client
maximum service period reached	the agency ended a support period because the maximum time period for which they can provide a service has been reached. That is, an agency may have conditions placed on their services relating to how long they can provide support to a client
service withdrawn from client and no referral made	the agency ended the client's support period because of inappropriate behaviour or breaking agency rules. Do not select if client was referred to another specialist homelessness agency
other – please specify	the support period ended for a reason not covered by the categories above
don't know	the client left unexpectedly, and you have no knowledge about the reason

Once you have selected your *reason for end support*, complete the remaining fields and confirm the panel. The housing panel will then automatically open.

The housing panel

Within the housing section, you will see a list of previous addresses for your client. You can select one of these addresses as the client's current address or add a new address.



You have the option to edit an address using the corresponding pencil icon providing that address has not been completed, by a moved-out date being set in the past.

> ***Note:***
>
> *Completed addresses (where moved in/out dates are already set) cannot be edited. If the client is returning to one of their old addresses, you will need to add it again, so that accurates time periods can be recorded for each separate stay at that location*

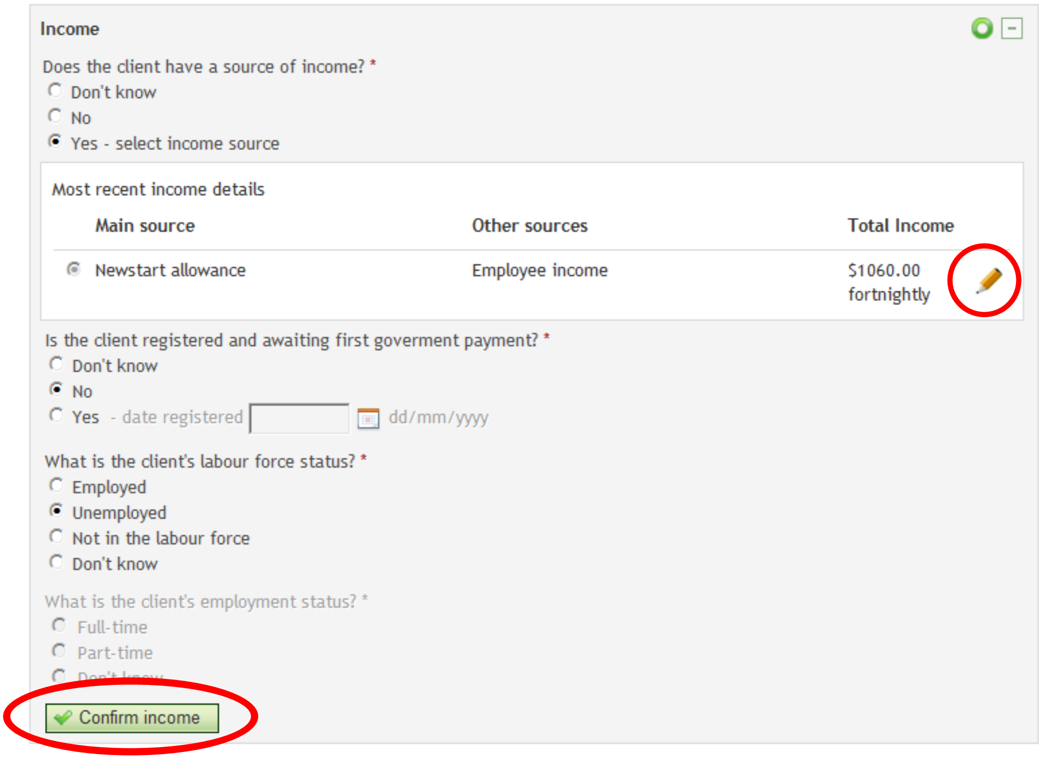
If the client is not exiting to their most recent current address, you will need to complete their previous current address, by adding a moved-out date, before you can add a new one.

> ***Note:***
>
> *House type, tenure, and conditions of occupancy information is used to determine whether a client has had a successful housing outcome at exit. Entering an 'other;' or 'don't know' response into any of these fields may result in the housing outcome for you client being recorded as an unknown*

The income panel

The income panel will automaticaly be pre-filled with income details that have been previously added to the client (either in the intake, or during the support period). In this panel you can update the existing information by clicking the edit pencil, or clicking the *add income* button if no income information exists.

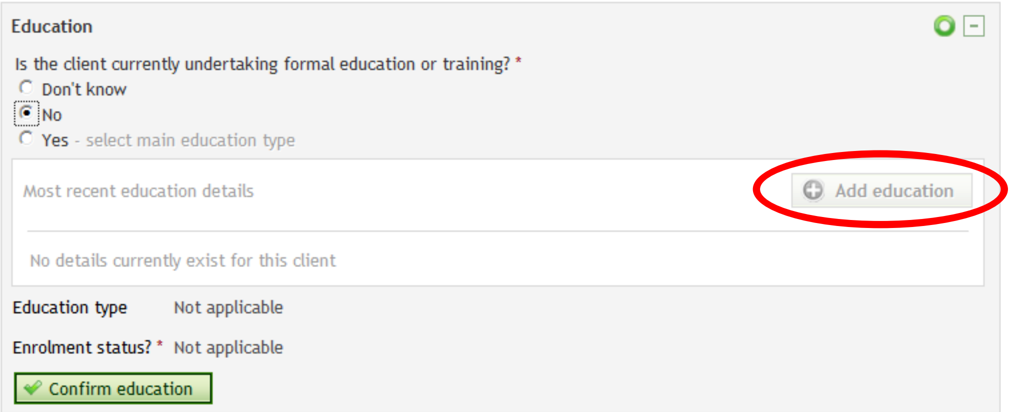
Complete the remaining fields and click the *confirm income* button. This will change the panel to view mode, and open the eduction panel.



The education panel

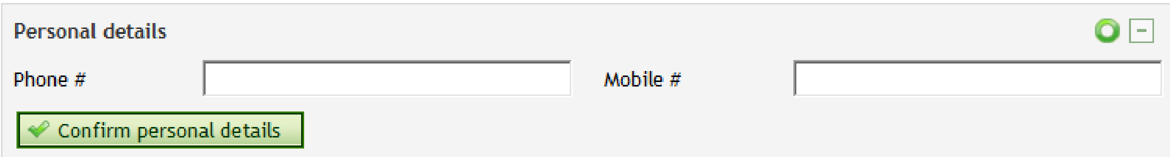
This contains the same education questions as the intake. As with the other panels, if details already exist on the client record, they will appear here.

If no details currently exist and you select ‘yes’ on the question ‘Is the client undertaking formal education or training’ you will be required to enter education details by pressing the *Add education* button, completing the details in the pop-up box and pressing *save*. You will need to answer the questions: education type and enrolment status.



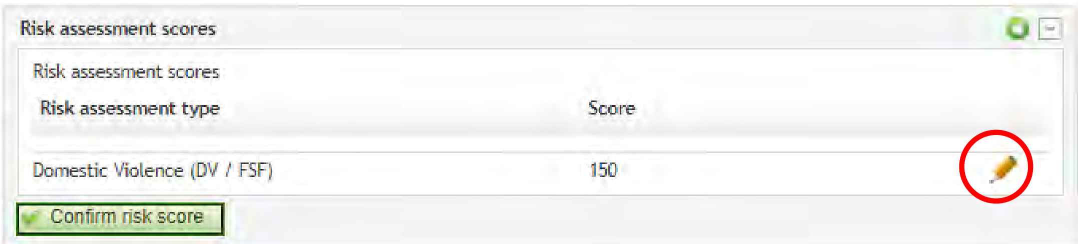
The personal details panel

Use this section to record any updated contact phone numbers for the client. If the client is under 18 you will have care and protection details shown. Check to see if these details are current and make an necessary changes.



The risk assessment scores panel

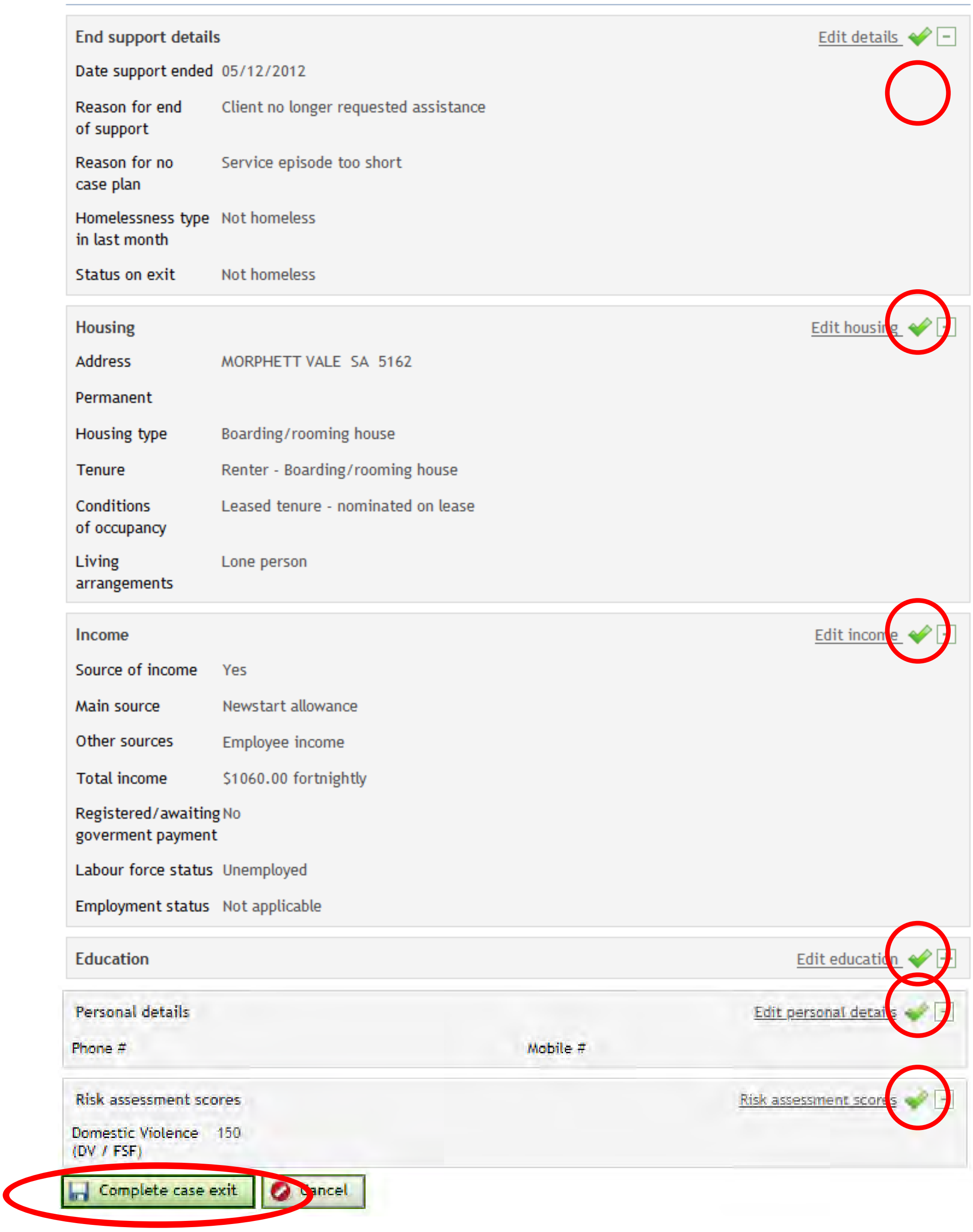
Here you can update at Risk scores already recorded (if relevant), to capture if a client's risk has reduced since the score was last recorded.



Where a client has an identified issue of Domestic/Family Violence, but has not has a score recorded, you will need to either add the risk score, or record the reason a risk assessment has not been completed.

Finalising the end support or case exit

After each panel is confirmed (green ticks in the top corner of each panel) the *complete* button will be available. If this button is greyed out, one or more panels are not yet complete. In this case, review the page to check that all panels have been completed.



clicking the *Complete* button shows a summary of the end support/case exit information (as shown below). The end support/case exit is no longer editable.

Created by	Jared Strapp AM (Murray Bridge/Adelaide Hills Generic Homelessness Service)

End support	
Date support ended	05/12/2012
Reason for end of support	Client no longer requested assistance
Reason for no case plan	Service episode too short
Homelessness type in last month	Not homeless
Status on exit	Not homeless

Housing	
Address	MORPHETT VALE SA 5162
Housing type	Boarding/rooming house
Tenure	Renter - Boarding/rooming house
Conditions of occupancy	Leased tenure - nominated on lease
Living arrangements	Lone person

Income	
Source of income	Yes
Main source	Newstart allowance
Registered/awaiting goverment payment	No
Labour force status	Unemployed
Employment status	Not applicable

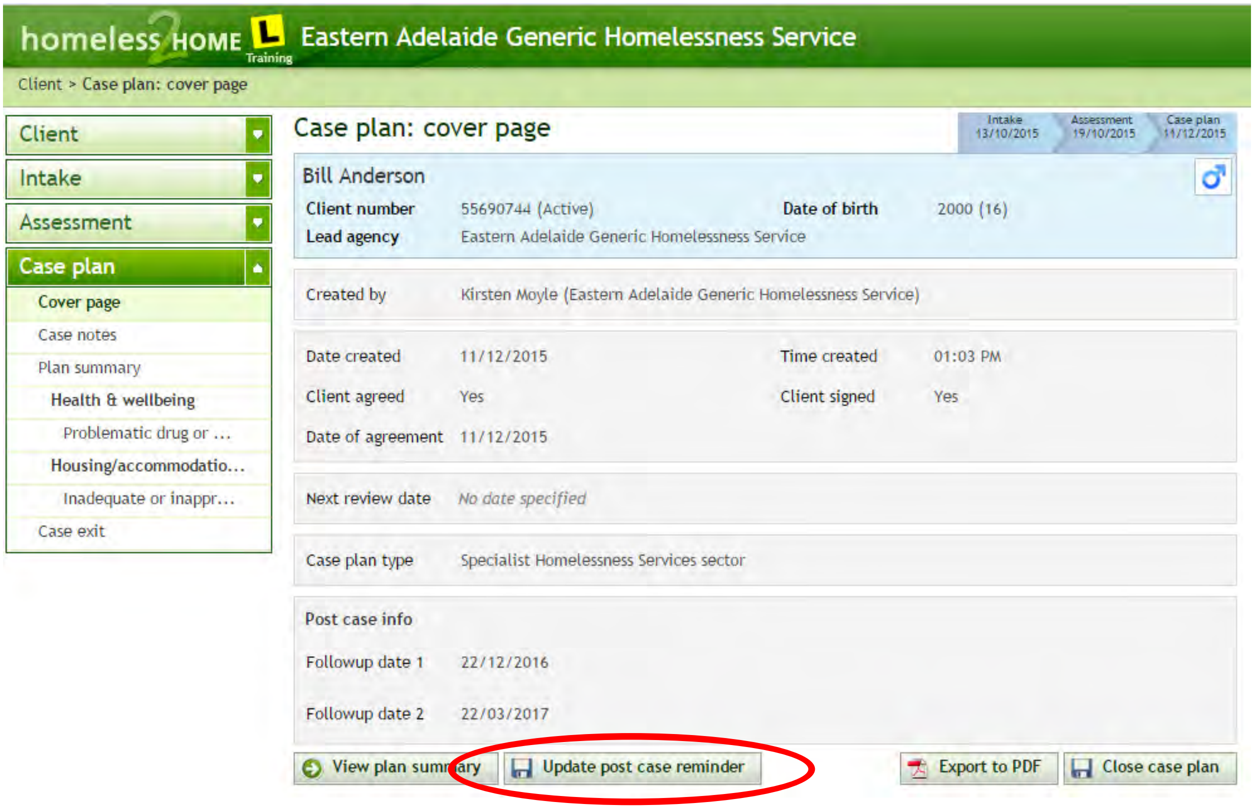
Education	
Formal education /training	No
Education type	Not applicable
Enrolment status	Not applicable

Post case follow ups

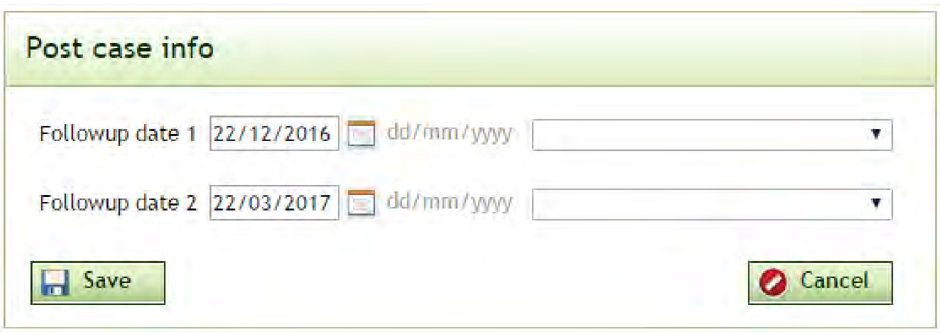
After completing the Case exit, the client status remains *active* to allow for post case reminder follow-ups. (If you have completed an end support, your client status will have immediately changed to inactive).

At 3- and 6-months post exit, you can follow up with the client, using the post case reminder fields to enter any provided information.

To update, select the button as indicated below;



Then complete the pop up that appears, and save.



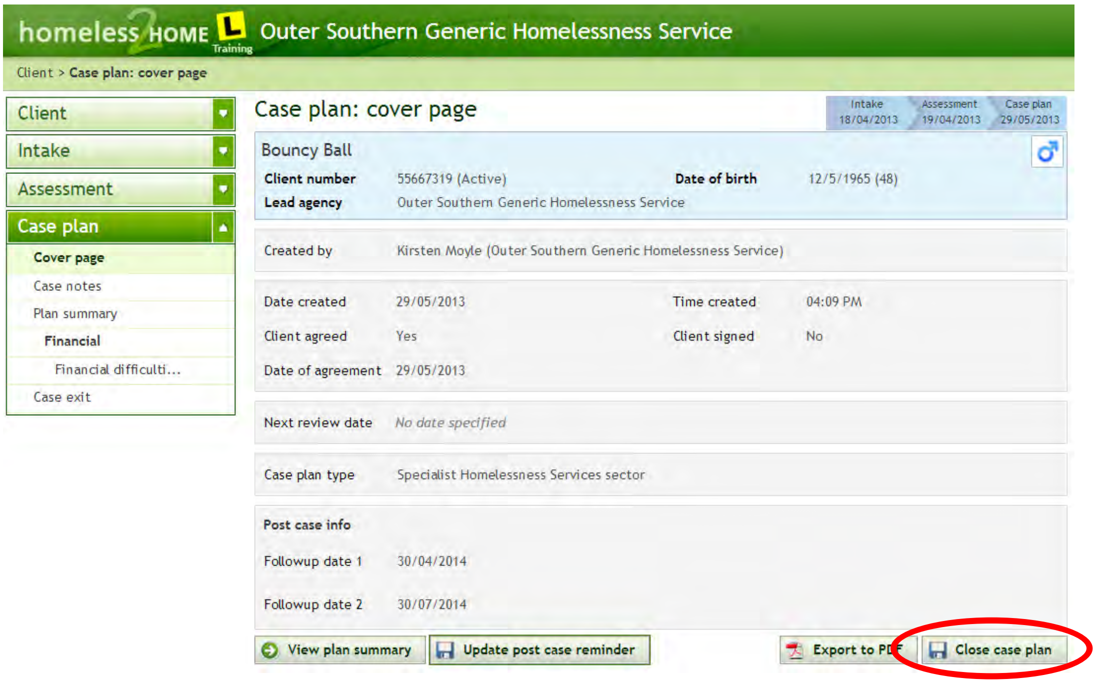
Post case reminders are not mandatory. You are not required to add dates to close the case plan.

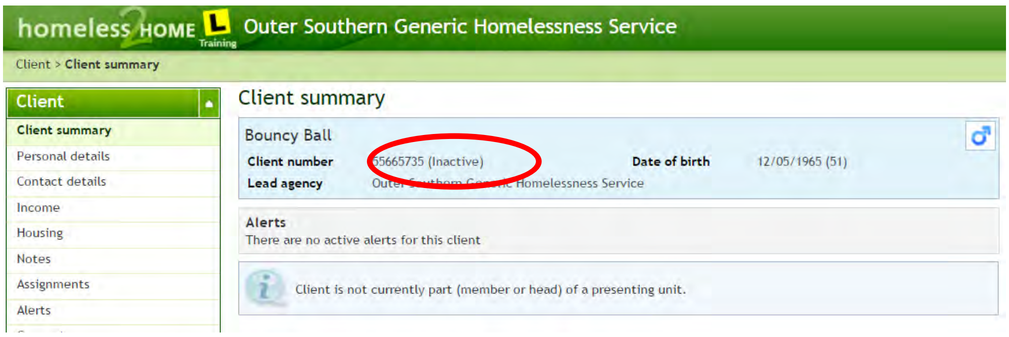
Closing your case plan

After completing an 'End support' the client status immediately becomes 'inactive'.

Closing a client after a 'Case Exit' is a two-step process.

After completing the Case exit (as explained above) the client status remains *active* to allow for post case reminder follow-ups. To close the client record (make the client *inactive*) press the *close case plan* button on the case plan cover page (as shown below) the client status will change to 'inactive'. The client record has now been closed.





homeless2HOME

Agency Manager Functions

About the Agency Manager role

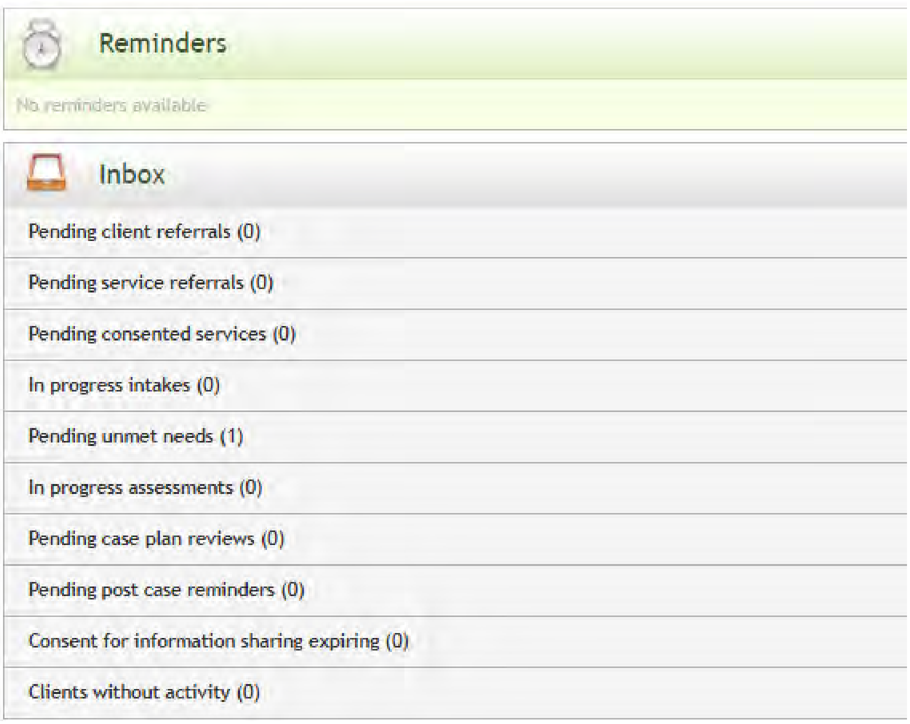
Agency Manager is the highest level of access to the H2H system. The agency manager role is responsible for monitoring activity, accepting and rejecting referrals, assigning clients to workers, setting records as locked/sensitive/deceased and downloading reports.

It is up to the individual agency to determine which staff will be allocated the agency manager user level. Some agencies elect to assign this role to multiple staff, and others nominate the role to those in leadership positions.

> ***Note:***
>
> *It is recommended that there be at least two users with agency manager level of access to ensure that referrals can be actioned in a timely manner in the event of staff absence due to leave or illness*

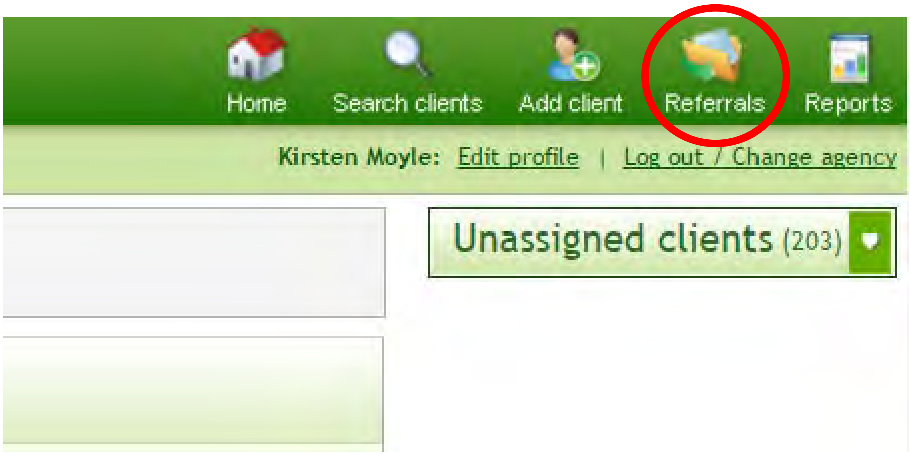
Reminders and the inbox

For Agency Managers, reminders and inbox notifications will appear for all clients, rather than only clients that are specifically assigned to the individual worker. This allows managers to monitor activity across the agency and follow up with workers on expiring consents, pending referrals and clients without activity.



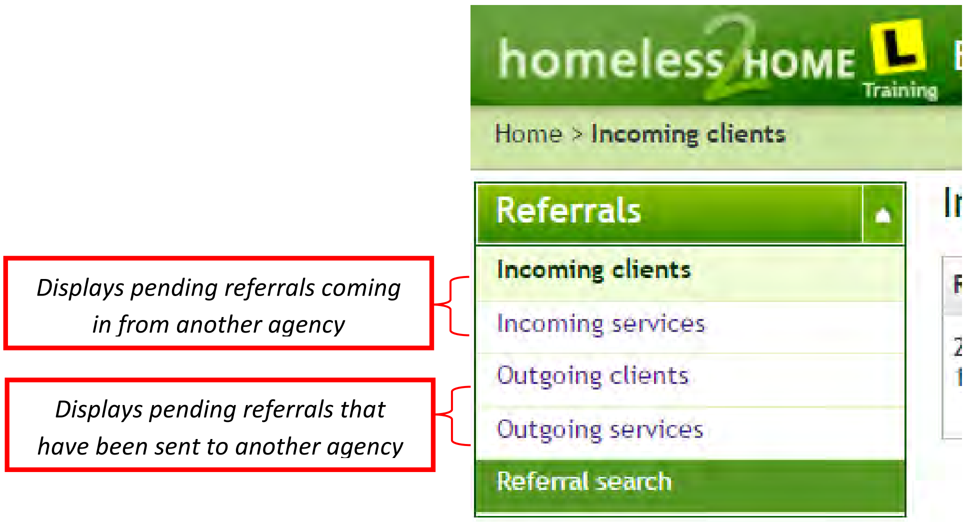
Referrals Menu

Agency Managers have access to two unique menus not available to other access levels. The first is the referrals menu.



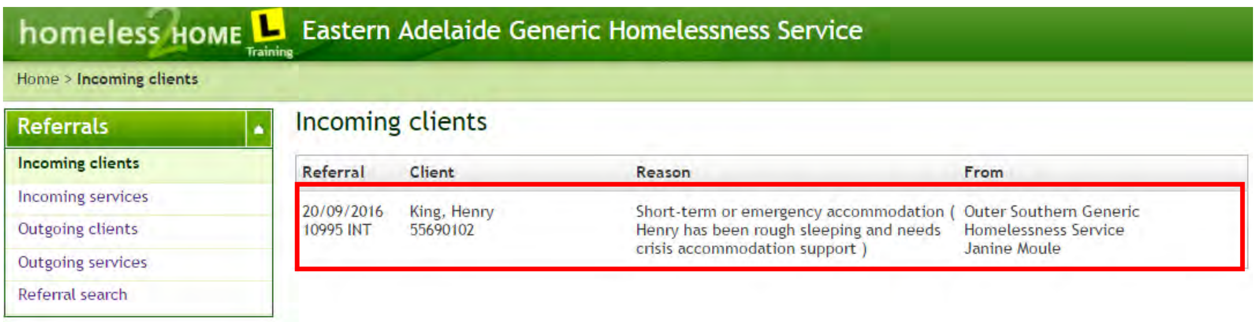
Agency managers are responsible for monitoring incoming and outgoing referrals (both client and service), to ensure they are actioned in a timely manner.

All agencies also have a designated referrals email address and will receive a notification when a referral is received, and when referrals are actioned. These referrals can be found in the menus as shown below;



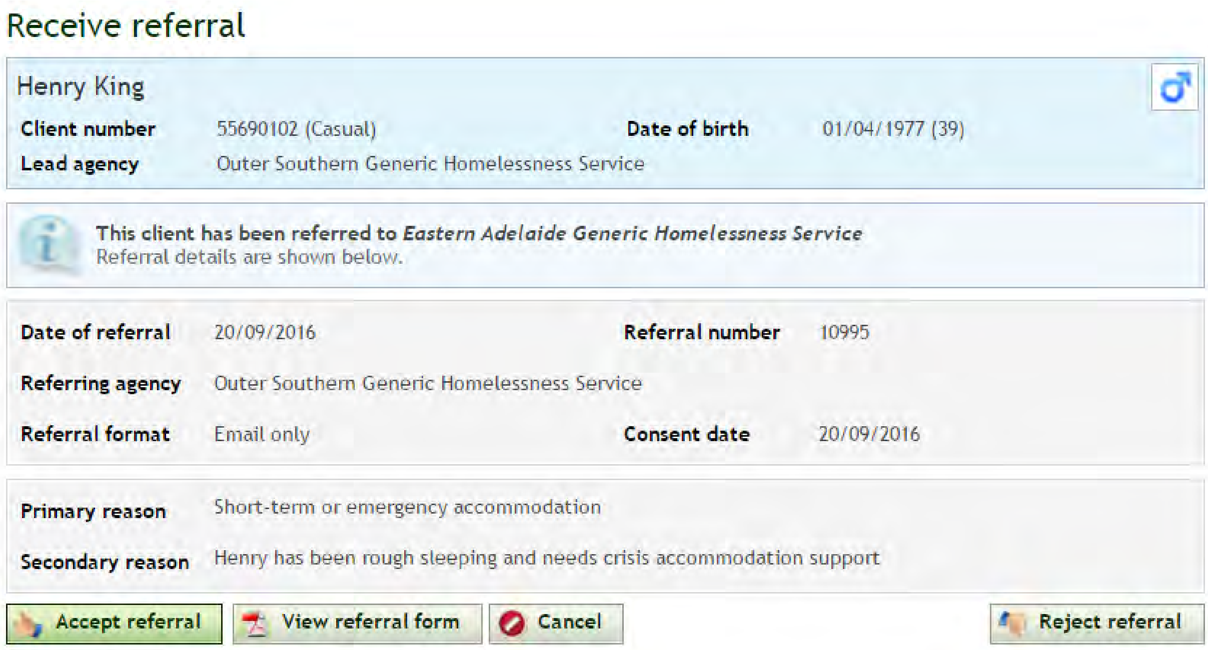
Client Referrals

To action a client referral, open by clicking within the text box as shown below;



The receive referral page will appear;

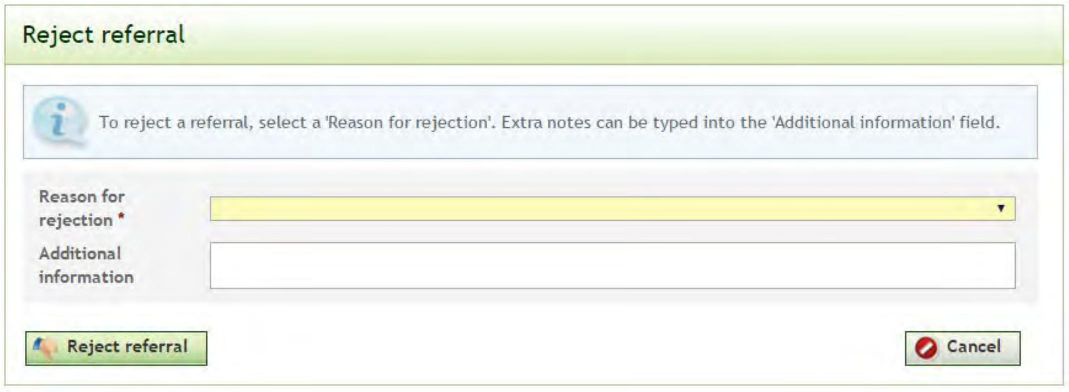
On this page you can either accept or reject the referral and view the pdf referral form if required.



To accept, select the accept referral button, on this screen, and then again on the pop up that appears to confirm;

On acceptance of the referral you will be re-directed to the personal details page.

To reject the client referral, select the reject referral button, then complete the reason for rejection in the pop up that appears;



After rejecting a referral you will be returned to the incoming clients screen, and the referral will have disappeared from the list.

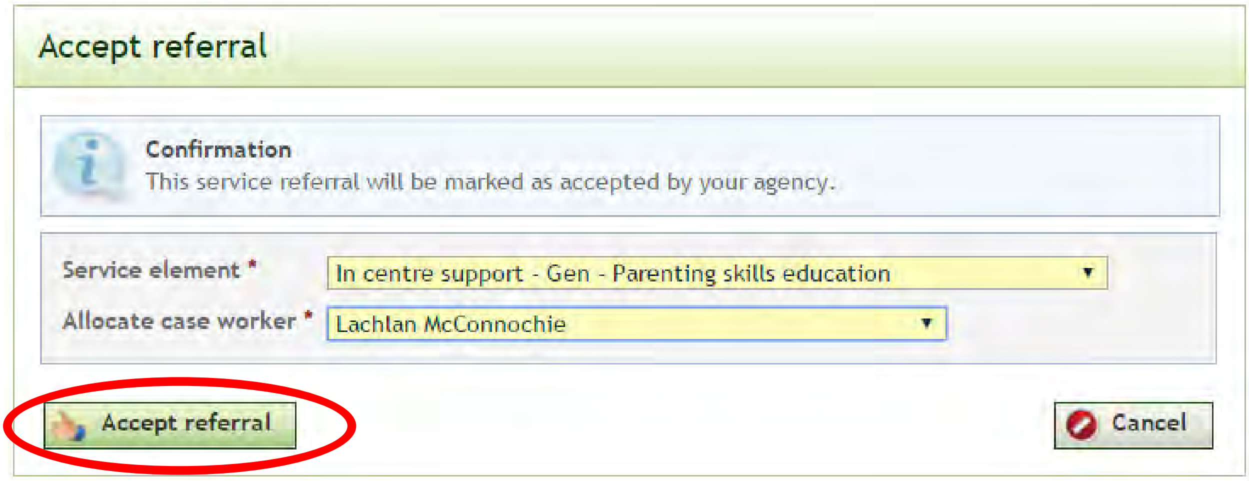
Service Referrals and Consented Services

Incoming service referrals are also accepted through the referral's menu. To action, go to the incoming services screen;

This screen will list the following types of services;

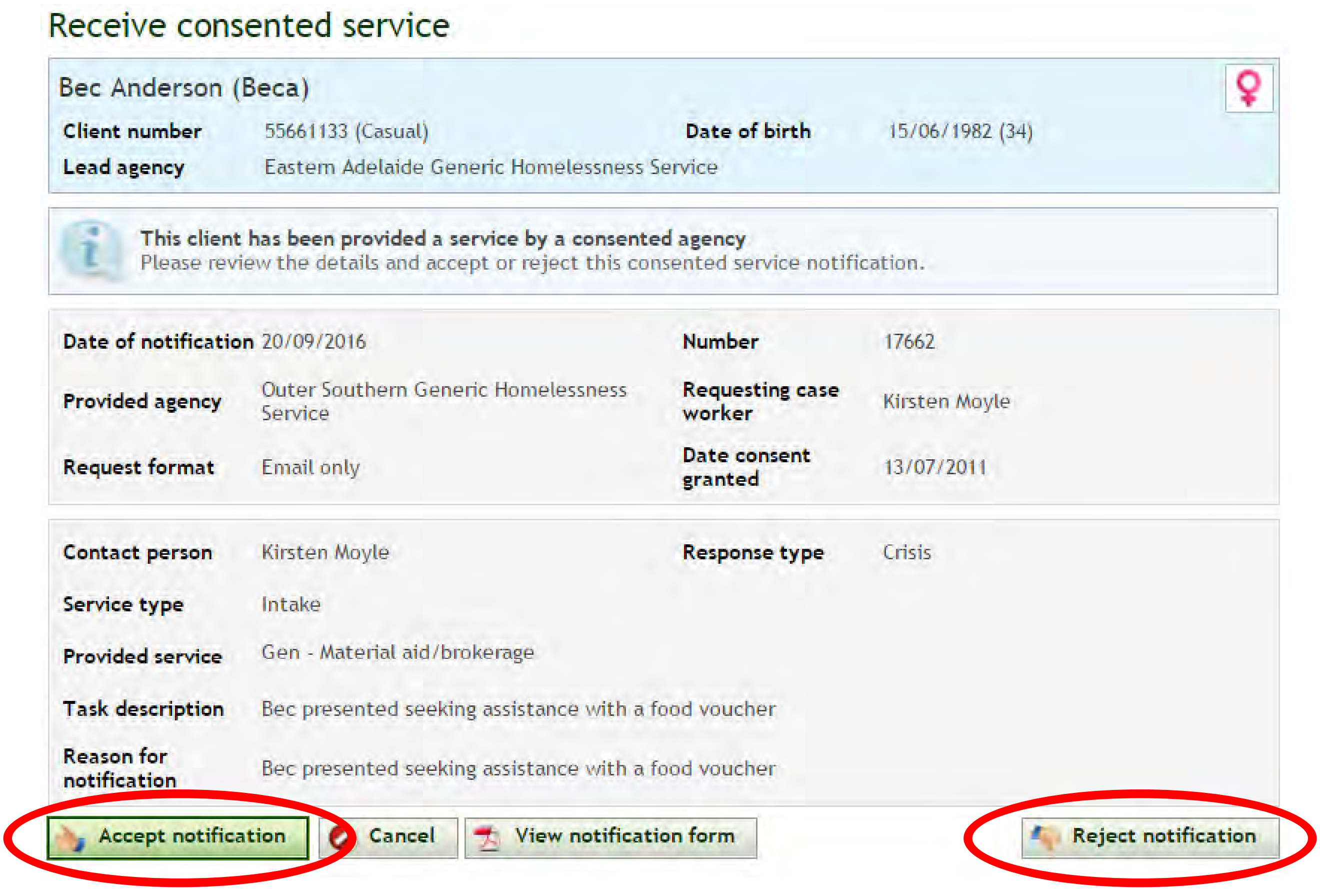
- Services referred by another lead agency
- Consented services provided to your client by another agency with consent
- The type column will indicate whether the referral is an intake service or case plan service
- The category column will indicate whether it is a service referral or a consented service

To accept or reject a service referral, click on the text in the list to open, and then select the appropriate button to either accept or reject. When accepting a service referral, you will need to identify the appropriate service element, and assign a caseworker;



To finalise a service that has been provided to your client by another agency (a consented service), open the consented service from the list;

This will open the 'receive consented service' page; where the notification can either be accepted or rejected.



You can also review outgoing client or service referrals through the referral's menu.

The outgoing clients screen will display all clients that have been referred to another agency but are still pending.

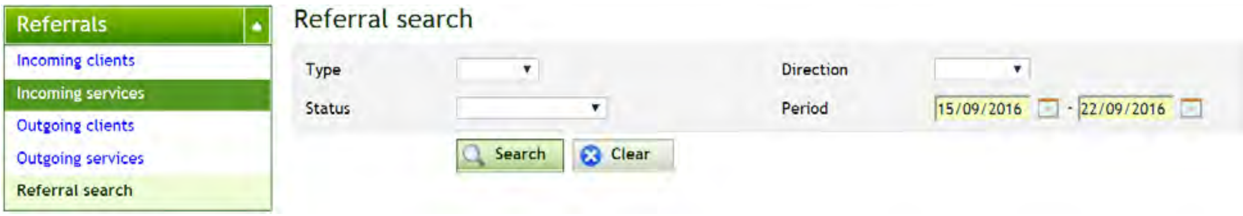
The outgoing services screen will display the following types of services;

- Services referred to another non-lead agency awaiting action
- Consented services provided to another agency's client awaiting action
- The type column will indicate whether the referral is an intake service or case plan service
- The category column will indicate whether it is a service referral or a consented service

If required, any outgoing client or service referrals can be withdrawn by opening the referral from the list and selecting the Withdraw button.

Referral Search

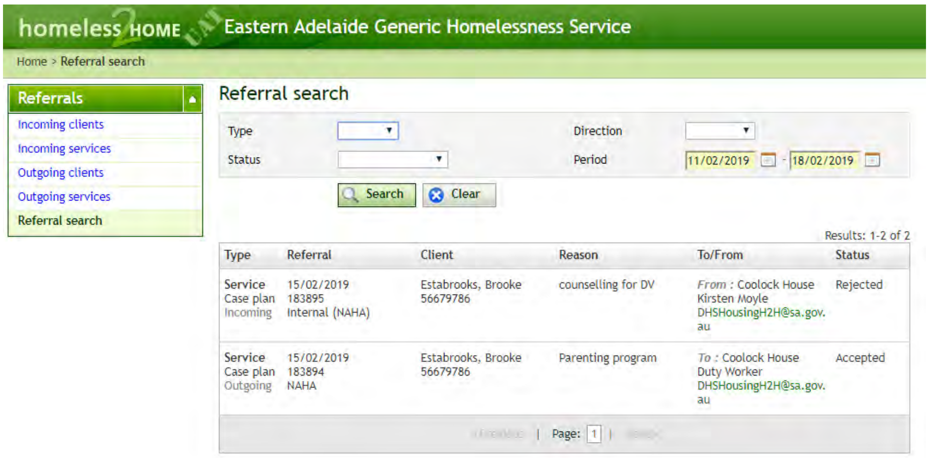
Agency managers are also able to search for a specific referral in the referral's menu;



Referrals can be searched by any combination of;

- Type – client or service
- Direction – incoming or outgoing
- Status – pending, accepted, rejected, withdrawn
- Time period

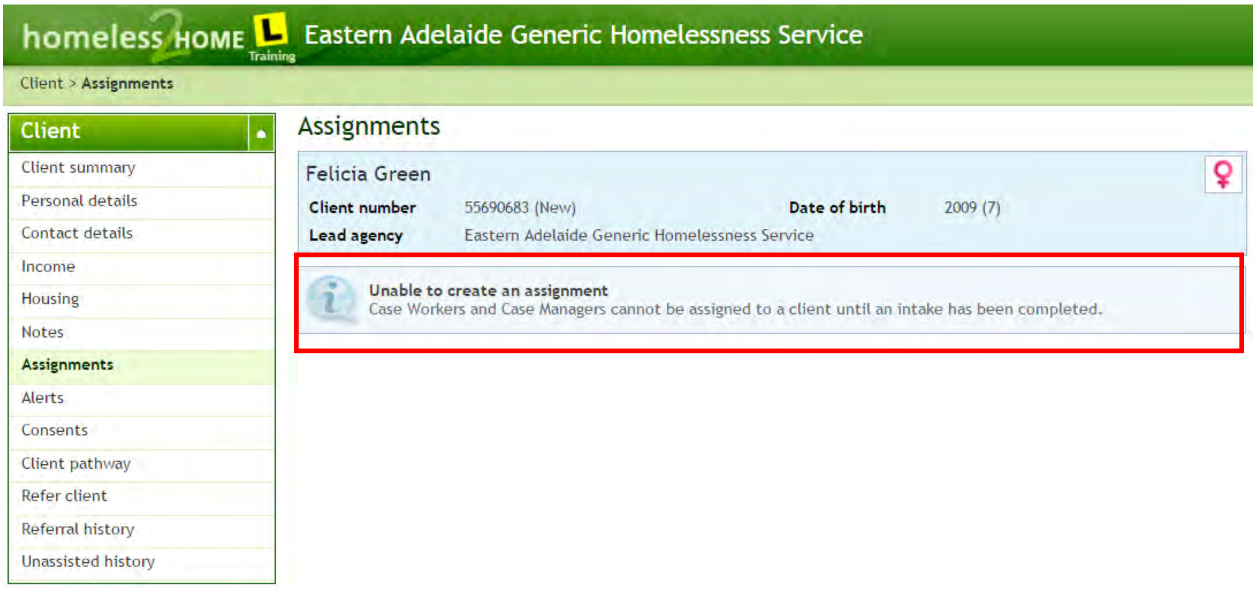
To use the search function, enter the selected criteria, and select search. Any matching referrals will be displayed; Click on each referral to view further details.



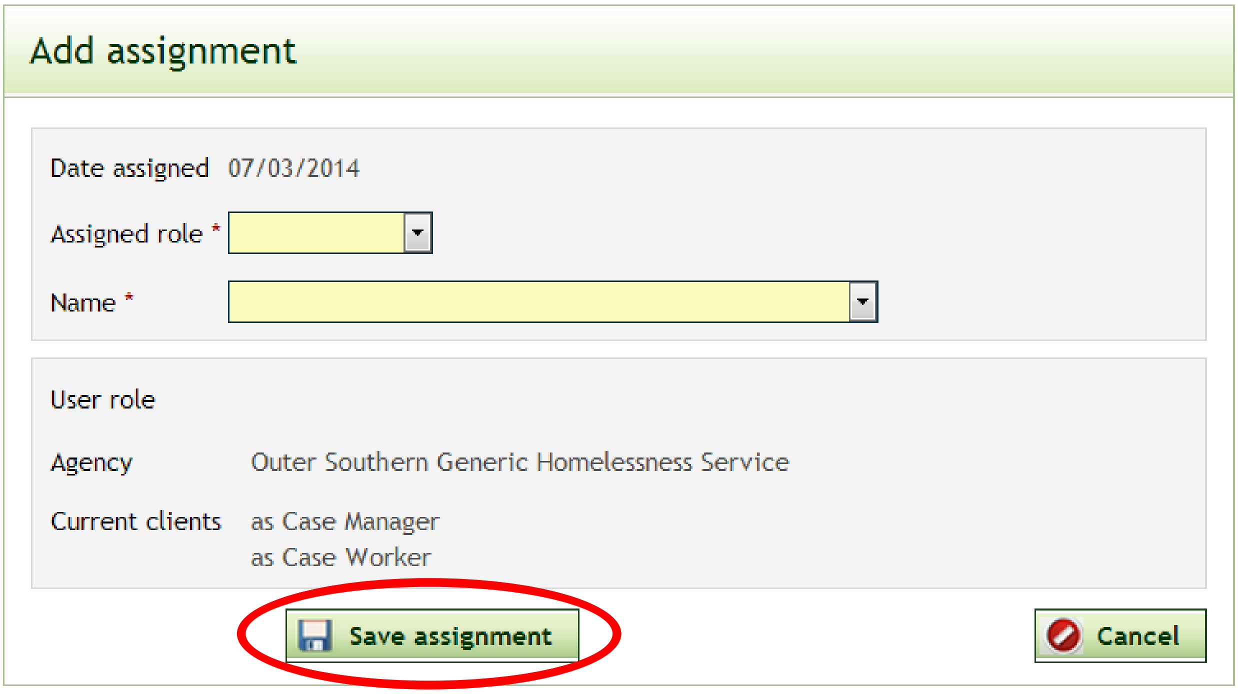
Assignments

In order to complete some actions on a client record, a worker must be assigned to a client as either a caseworker or case manager (depending on the user's access level to the system). The responsibility for assignments sits with the agency manager role.

In order to assign a worker to a client, the client must first have had an intake completed. If an intake has not yet been completed, you will see a warning when trying to open the assignments screen;

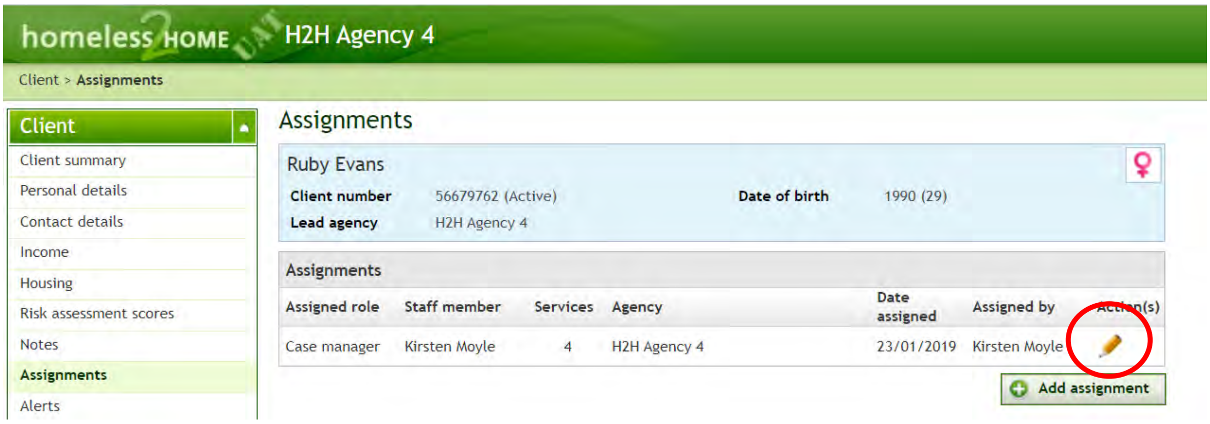


Once the client has reached at least a status of 'casual', you will be able to assign them to a worker. To assign a case manager or case worker, click on the *assignments* page within the *client* menu and then click the *add assignment* button. The following pop-up box then appears:



Complete the relevant fields to assign a worker and click the *save assignment* button.

Any currently assigned workers will be listed on the assignments page; and can be edited if required by using the pencil icon as shown below;



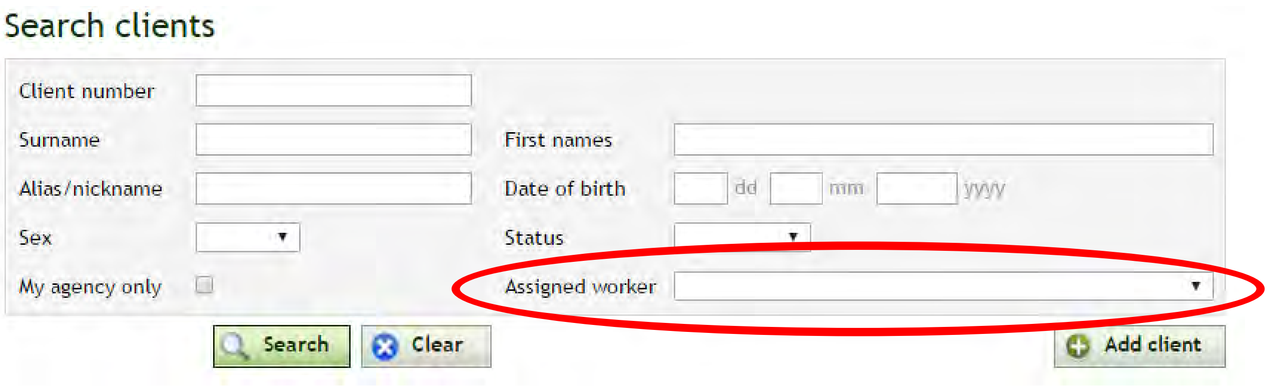
Note:

A worker cannot be both a case worker and a case manager at the same time. If a worker is already assigned as a case worker, and you wish to make them a case manager, select the edit pencil and change their assigned role in the pop up that appears

Assignment Rules Summary	
case workers	A case worker can be assigned either by an agency manager, or automatically by the system through adding an intake service to the client record or by being assigned a service referred from other agencies during the referral acceptance process. As many case workers as needed can be assigned to the client.
case managers	Only one case manager can be assigned at a time. The case manager must be assigned directly by an agency manager. A client must have a case manager assigned before a case plan can be opened.
agency managers	Agency managers can add services or make changes to a client's case plan without being assigned as a case worker or case manager.

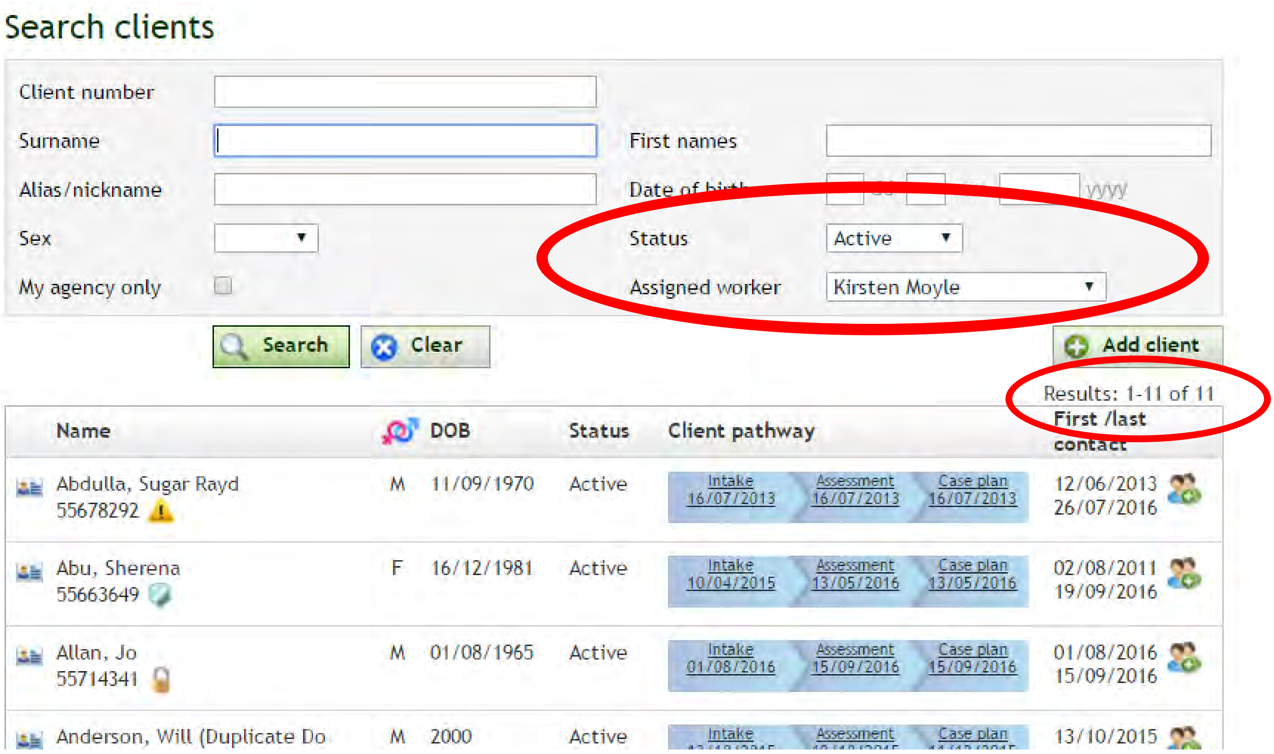
Search by worker

Agency managers can search client records by the assigned worker;



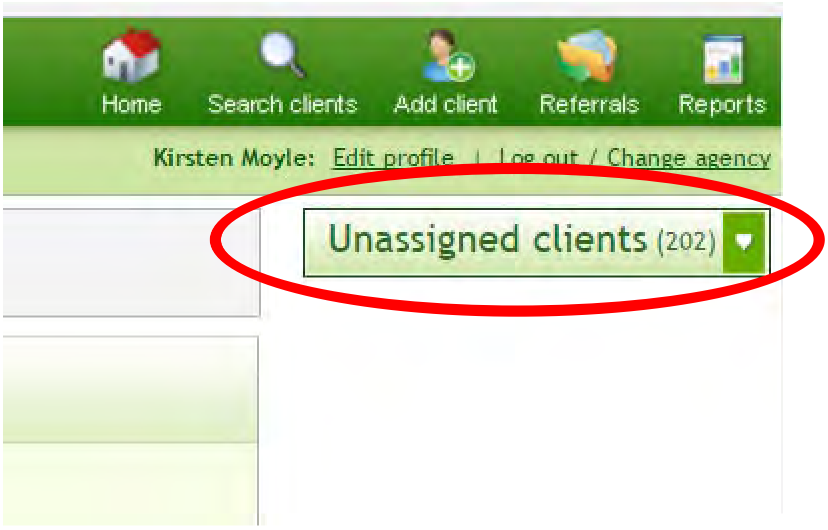
Agency managers can select a worker's name from the list and select the search button to display all clients who are assigned to that worker, whether as case worker, case manager, and as either a lead or consented agency.

Additional search fields can also be completed if you wish to narrow the results down further, e.g. selecting a status of 'Active' combined with an assigned worker's name, will display all clients in case plan assigned to that worker;



Unassigned Clients List

On the home page, agency managers will find the Unassigned clients list;



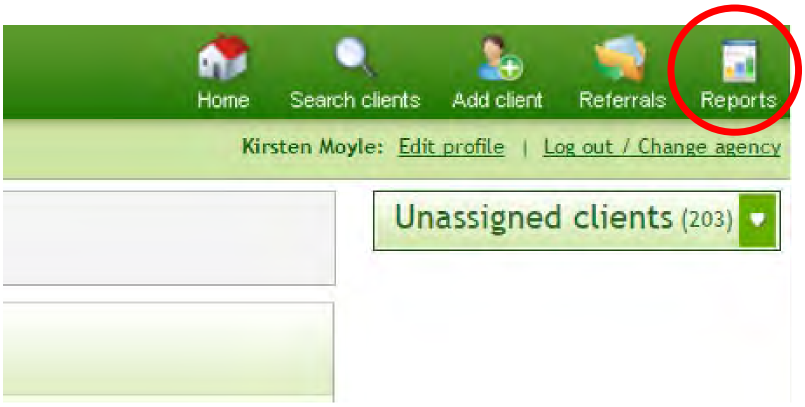
This list will display in alphabetical order, by surname, any client record with a status of new, casual, or assessed, that has not been assigned to a case manager.

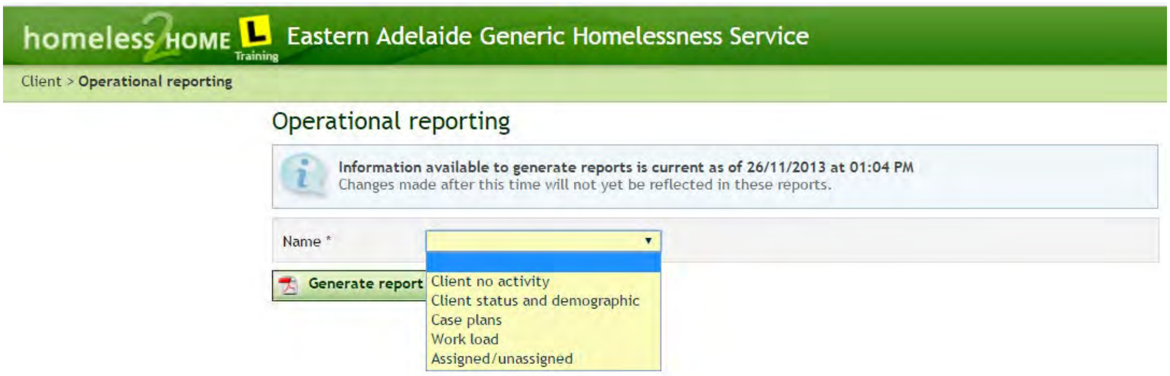
Clients who have had a case worker assigned will still appear in the unassigned clients list.

To remove a client from the unassigned client list they must either be assigned a case manager, or either an end support or unassisted completed.

Reports

The operational reports function in H2H allows agency managers to download five types of pdf reports





These reports are for the majority 'point in time' only, which means they will not return historical information, only information 'as of today'. You cannot add multiple reports together to get a total for a certain period, as the reports can change daily to reflect the current client group.

Read on below for information about the different types of reports;

H2H Operational Reports	
Client no activity	Displays clients who have had no activity in the current month (completion of an intake, assessment, case plan, or addition of a service are all considered 'activity')
Client status and demographic	Point in time report of all clients where your agency is the current or last lead agency. Includes client status, ATSI/Non ATSI, sex, age range. Displays all clients
Case Plans	Number of case plans that were open/closed during a selected date range
Work load	Point in time report displaying worker workload summary including summaries for case managers, case workers, and consented clients, broken down by open and closed services.
Assigned/Unassigned	Point in time report of number of clients where you are the current or last lead agency that are assigned or unassigned.

Sensitive and Locked

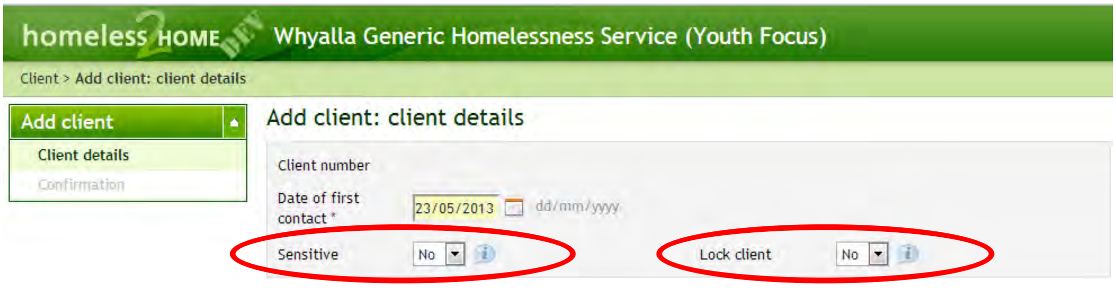
The sensitive and locked functions can be used to restrict the ability to view client records where there is a risk to client safety. These functions can only be accessed by users with agency manager access.

Workers should only add sensitive or locked status to a client in exceptional circumstances, where there is real likelihood that the client is at risk of harm if someone **with access to H2H** could view their information, or if there are pressing confidentiality concerns.

For example;

- a client presenting to a domestic violence service identifies that the perpetrator is employed by another SHS
- a worker of an SHS has been homeless or experienced domestic violence in their past, and does not want their colleagues to be able to view their support history
- a worker of an SHS is currently seeking assistance from another SHS and does not want their colleagues to be aware of their situation

The locked and sensitive functions can be found at the top of the *add client* or *personal details* page within the client menu when in edit mode.



Sensitive and Locked Definitions	
Sensitive	Setting a client's record to *sensitive* means that only workers within the clients lead or consented agencies will be able to find the record in a H2H search
Locked	Setting a client's record to *locked* means that only agency managers and workers directly assigned to the client will have access to the record (either as lead or consented agency). Locking a client record even restricts your work colleagues from finding the client in H2H, and should therefore only be used in exceptional circumstances

Note:

A client should be set as either locked OR sensitive, not both. The locked function over-rides the sensitive function, so there is no purpose in setting a client to both.

Set Deceased

If a client has passed away, you will need to set the record to deceased. This function is only available to users with agency manager access.

To set a client as deceased, go to the personal details screen within the client menu;

Scroll to the bottom of the screen and select the 

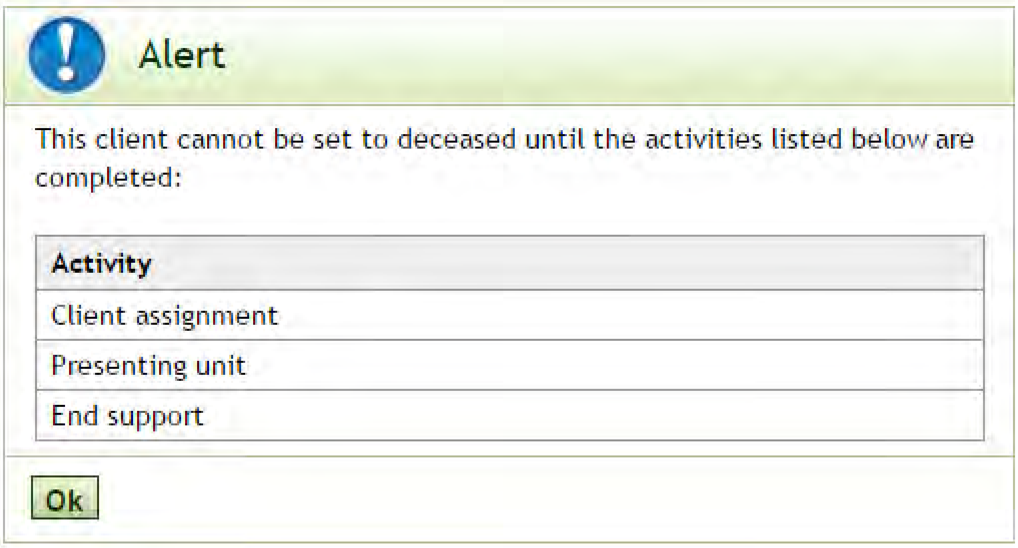
button.

> ***Note:***
>
> *All client deaths need to be reported to your SA Housing Authority contract manager. Please contact your contract manager to determine what reporting may be required BEFORE setting the client record as deceased.*

Once in edit mode, you will find the 

button at the bottom of your screen.

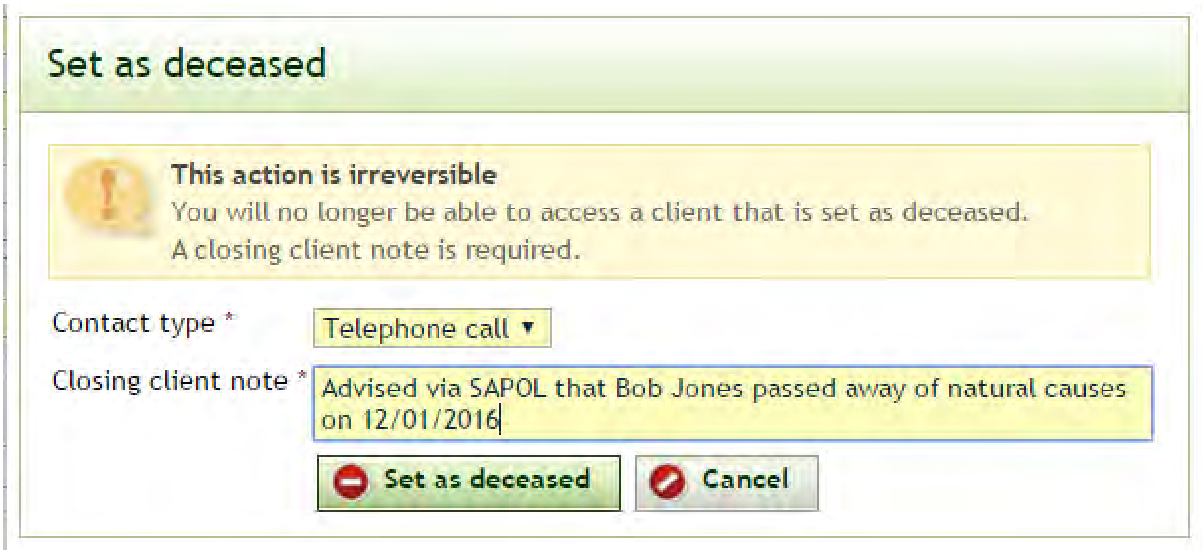
Depending on the status of the client you may receive an alert when attempting to set deceased;



In order to set a client as deceased the record must be inactive, so you may need to complete an end support or case exit. When you complete the 'reason for end support' ensure you select the reason 'client passed away'.

> ***Note:***
>
> *Once the record has been set deceased it will no longer be visible on H2H. If you wish to print a copy of the case plan or any notes you will need to do this BEFORE setting the client record to deceased.*

Once the client record is inactive, and you have printed any required documents, you will then be able to set the record to deceased, by selecting the set deceased button and then completing the pop up that appears;



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Definitions and Glossary of Terms

Service Definitions

Definitions of each specific service can be found in detail in the AIHW - SHS collection manual accessible on the H2H support page.

Service Element Definitions

Service elements are used to determine what part of your program the client is being supported by. The list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency operates as part of an Alliance. If you are unsure which service element to choose for the clients' circumstance, speak to your team leader or manager.

You can find definitions for your agency service elements in the two charts below;

Service element definitions – Alliance Agencies	
Accommodation	Accommodation provided directly by your agency, for example, on-site crisis or transitional accommodation. This is used to collect data of actual nights of accommodation that have been provided to a client. Accommodation that has been paid for by an agency using brokerage (i.e. an agency paying for a night's motel accommodation for a client) would be recorded using the 'Accommodation – Brokerage'.
Accommodation - Brokerage	Where an Agency has paid for accommodation for a client using their brokerage funding (i.e. an agency paying for a night's motel accommodation for a client), where other funding sources were not available (e.g. Housing SA)
Adolescent brokerage	Provision of case management and brokerage support to young people (16-20) who are unable to access mainstream or other funding sources because they do not meet the required eligibility criteria.
Brokerage	Brokerage funds are allocated to purchase specialist services required by clients. Specialist services are those services, or to overcome geographical restrictions to service provision. Brokerage funds are allocated for meeting crisis needs and implementing case plan goals.
Boarding house support	Support provided to clients residing in Boarding Houses in the metropolitan area to help them sustain their accommodation and/or access other more suitable forms of housing.
Early intervention/prevention	Initiatives which work to ensure people don't experience homelessness, or domestic and family violence. Early intervention works to reduce the risk factors and increase the protective factors associated with people experiencing homelessness, or domestic and family violence.
General assistance and support	A wide range of support provided by an agency worker that is not a specialised service. That is, the support is provided without the expectation that the worker has completed formal, specialised training in that area of assistance. General assistance may cover a range of

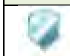
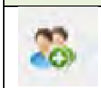
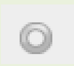
	assistance from financial assistance/information, employment/training assistance, to assistance for domestic/family violence and family/relationship assistance.
Rough sleeper response	Provision of support for people who are rough sleeping to transition into safe, stable and sustainable housing. Includes case management support to access housing and manage their health care needs.
Motel support	Services provided to clients placed in motel accommodation due to a lack of alternative crisis accommodation options.
DV – Perpetrator response	Targeted responses and interventions for individuals who have perpetrated domestic and/or family violence
Return to country	Outreach support and appropriate financial assistance to support Aboriginal people experiencing, or at risk of experiencing homelessness, to return to their home communities
Risk assessment	A structured and systematic approach for understanding and assessing risk which is linked to safety planning for people experiencing or at risk of experiencing domestic and family violence
Safe at home	Interventions, strategies, or programs that aim to support women and their children experiencing domestic and or/family violence to remain safely in their home or home of their choice, community, or community of their choice where it is safe to do so
DV – Safe transport	Safe transport supports for people escaping domestic and/or family violence. It includes working in partnership with relevant agencies and facilitating an assisted referral process to enable and safe and connected transition for the client to appropriate services at their destination
Safety planning	The process of supporting a client to identify what can be put in place to help protect themselves and their children and make them feel safer. It must be relevant to a client's needs. Adapted if their situation changes and be provided in a safe and supportive environment using trauma-informed and strength-based approaches.
Specialised services	Assistance that can be provided only by a person with formal, specialised training in that area of assistance. Specialised services may range from psychological/psychiatric services to professional legal services. Specialised services may be provided by agency workers or may require an agency worker to assist the client in receiving external services. This does not include assistance for family and domestic violence.
Supportive housing packages	A funded package of support and case management to eligible vulnerable people with complex needs, to support them to live independently, and secure and maintain a tenancy. Housing SA and Community Housing Providers (CHPs) provide and manage the properties and tenancies.

Service element definitions – Directly Contracted Service Providers	
Accommodation	Accommodation provided directly by your agency, for example, on-site crisis or transitional accommodation. This is used to collect data of actual nights of accommodation that have been provided to a client. Accommodation that has been paid for by an agency using brokerage (i.e. an agency paying for a night's motel accommodation for a client) would be recorded using the 'Accommodation – Brokerage'.
Accommodation - Brokerage	Where an Agency has paid for accommodation for a client using their brokerage funding (i.e. an agency paying for a night's motel accommodation for a client), where other funding sources were not available (e.g. Housing SA)
Assertive outreach	Aims to provide pathways out of homelessness by delivering a housing first response as an effective response to ending rough sleeping. To be used only by agencies who have a specific assertive outreach component included within their service agreement. • Reduce the incidence of people sleeping rough by providing support to access appropriate accommodation and specialist case management support • Establish an effective intake system for people sleeping rough, with appropriate risk and assessment tools to determine and record client needs • Acknowledge and target individuals immediate and longer-term needs • Provide a multi-disciplinary team approach to outreach work and case management practice, Engage clients in the development of exit-oriented plans that enable them to attain the necessary degree of independent living skills and move into long term housing with outreach support where required.
Brokerage	Brokerage funds are allocated to purchase specialist services required by clients. Specialist services are those services, or to overcome geographical restrictions to service provision. Brokerage funds are allocated for meeting crisis needs and implementing case plan goals.
Counselling (general counselling, DV and AFV specific, family mediation and therapy, sexual abuse specific)	Services provided to clients for counselling from an agency funded to provide counselling assistance. This may be specific to Domestic Violence, Aboriginal and family violence counselling, family mediation and or therapy, youth or sexual abuse specific or non-specific counselling.
Risk assessment	Services provided to the client throughout the process of completing a Domestic Violence Risk Assessment
Early intervention/prevention	Services to assist clients at risk of becoming homeless, also covers the circumstances of ITS clients. ITS element is specific to ITS targets and applies only to tenancy situations. Early intervention also covers

	situations where the client owns the home or is living rent free with family or partner and is experiencing domestic violence or abuse, or at risk of defaulting on mortgage repayments, or experiencing family breakdown, or where client is transitioning from custodial or care arrangements.
Early intervention outreach	Services provided to support women and their children on an outreach basis in identified community settings (e.g. courts) before they are able or willing to engage fully with agencies.
Gateway – Domestic Violence Specific	Gateway for service functions that have been provided by the Domestic Violence Gateway. See *Gateway for Service* for more detail
Gateway – Youth Specific	Gateway for service functions that have been provided by the Youth Gateway. See *Gateway for Service* for more detail
Gateway for service	A client has presented to your agency and is either not eligible or would be better placed with another agency and is subsequently referred. E.g. If a client under the age of 16 presents to your agency where the target group is adults, you would 'Add Client' and do an Intake on H2H, then refer the client to a more appropriate agency.
In centre support	Support provided at the agencies premises and defined as: 1. One on one contact with a client 2. Group setting – e.g. if an agency runs a course (i.e. parenting course) and several different clients attend this course then this is defined as 'In Centre Support' for the purposes of reporting.
In home accommodation support	Specific to Adelaide Common Ground to record: • Personal care (showering, grooming, dressing, toileting) • Activities of daily living (assistance with budgeting, bill paying, reading correspondence, filling out forms, arranging and attending appointments) • Mobility (transfers, use of equipment, transport arrangements) • Community access – programs, community services, mainstream services, friends, family • Communication (use of equipment and systems to ensure that clients can communicate their needs and develop social networks) • Health care support (medication management, other) • Behaviour management (as per behaviour management plans) • Therapy support (as per programs from approved therapists e.g. physiotherapists, occupational therapists, speech therapists, etc.)
Intensive tenancy support	Services undertaken with ITS clients where ITS targets are included in the agency's service agreement.

Boarding house support	Support provided to clients residing in Boarding Houses in the metropolitan area to help them sustain their accommodation and/or access other more suitable forms of housing where your service agreement includes targets for metropolitan boarding house support.
Outreach support	Services provided to clients in an outreach setting.
Post Crisis Support	Services to clients who have been stabilised and are at the stage where agency support is being ended by the agency.
Support to engage	Specific to the Generic, Youth, and Domestic and Aboriginal Family Violence Gateway Services. This service element involves telephone support to clients to engage with the SHS, or DV&AFV sectors, and other relevant government and non-government organisations. Support to engage will continue until a referral has successfully engaged with the Specialist Homelessness Sector, or a client no longer needs gateway support.
Supportive housing packages	Services provided to clients living in Supportive Housing Package properties provided by either a PGP or Housing SA where Supportive Housing targets are included in your Service Agreement.
Motel support	Services provided to clients placed in motel accommodation due to a lack of alternative crisis accommodation options. For further information please refer to the Emergency Accommodation (PRAP funded Motel/Hotel) Guidelines.
Waitlist support	Support provided to any client who is awaiting accommodation, or a case plan to be started.

Icons in H2H

Icon	Definition	Location
	tool tip – hovering mouse over this icon will reveal a description or definition for the relevant area it is placed	system wide
	Found at the end of a row of a possible matching client record during the duplicate check process. Selecting this icon discards your draft client and redirects to the selected clients record	duplicate check (add client process)
	indicates that a search result is a client of your lead agency, or you were the last lead agency to work with the client	search clients
	indicates an alert on the client record. Open the client summary page to read the alert	search clients
	when seen on a search result, indicates your agency is a consented agency for this client	search clients
	when seen in the intake, indicates that a panel has been completed	intake
	when seen in the case plan summary page, indicates that an issue has been resolved	case plan
	when seen in the end support or case exit, indicates that a panel has been completed	end support/case exit
	client record is set to sensitive	search clients
	client record is set to locked	search clients
	Found at the end of a row listing a client record. Selecting this button creates a new draft client, based on this client's details (useful when adding multiple family members who have similar personal details)	search clients
	Edit button. Selecting will open certain fields to be edited such as end dates, descriptions, personal details, etc.	system wide
	Indicates that service is still open (end date has not passed/or has not been closed)	services
	Indicates a consented service (a service provided by a non-lead agency) that is pending (has not been actioned by the lead agency)	services
	Indicates that the service is still open, and it has passed its end date and requires closing. The service must be closed by the agency that provided it	services

	Select to withdraw a client referral, an internal service referral, or a consented service. This button will only be available if the referral is in pending state	**referrals (client/service)**
	Indicates a service that has closed	**services**
	indicates a service that has been closed and saved as ‘entered in error’.	**services**
	Repeat service button (only available when the service is closed). Clicking this icon will create a new service with most fields pre-populated	**services**
	found when adding an address. Will bring up a suburb search tool to locate suburbs and their postcode	**Housing Panel**
	Pending service referral that has not been accepted, or consented service notification not accepted by lead agency	**services**
	Referred or consented service that has been rejected	**services**

Glossary of Common Terms

Common Terms	
Agency	The physical location (or service outlet) where the funded program is operated. It is possible to have one program operate from multiple agencies and multiple programs operate from one agency.
AIHW	Australian Institute of Health and Welfare is an independent statutory authority set up by the Australian Government to provide reliable, regular and relevant information and statistics on Australia's health and welfare.
At risk of homelessness	A person is at risk of homelessness if they are at risk of losing their accommodation or they are experiencing one or more of a range of factors or triggers that can contribute to homelessness. Risk factors include: • Financial stress (including due to loss of income, low income, gambling, change of family circumstances) • Housing affordability stress and housing crisis (pending evictions/ foreclosures, rental/ or mortgage arrears) • Inadequate or inappropriate dwelling conditions, including accommodation which is unsafe, unsuitable or overcrowded • Previous accommodation ended • Relationship/family breakdown • Child abuse, neglect or environments where child/ren are at risk • Sexual abuse • Domestic/ family violence • Non-family violence • Mental health issues or other health problems • Problematic alcohol, drug or substance use • Employment difficulties and unemployment • Problematic gambling • Transitions from custodial and care arrangements, including out of home care, independent living arrangements for children aged under 18, health and mental health facilities/ programs, juvenile / youth justice and correctional facilities • Discrimination including racial discrimination (e.g. Aboriginal people in urban rental market) • Disengagement with school or other education and training • Involvement or exposure to criminal activities • Antisocial behaviour • Lack of family and/ or community support • Staying in a boarding house for 12 weeks or more without security of tenure
Case management	A collaborative process of assessment, planning and advocacy to meet an individual's needs.

Client	A person of any age who receives a direct service from a Specialist Homelessness agency.
Client referral	The process by which the responsibility for the management of a client is transferred from one agency to another.
Consented agency	An agency that has been requested by the lead agency with the consent of a client, to assist in providing support to a referred client that is case managed at a lead agency.
De-identified information	This is information that is gathered from people accessing SHS Agencies for services. The information is carefully selected to ensure that an individual providing the information cannot be identified in any way. It is not possible to look at the information and know who provided it.
Homeless	The AIHW define homelessness as: A person is homeless if they are either: • Living in non-conventional accommodation or 'sleeping rough', or • Living in short-term or emergency accommodation due to a lack of other options
Lead agency	An agency where a client presents or is referred to for assistance with homelessness. The lead agency is responsible to provide a lead role in the support of a client, in most instances through a case managed response.
Life domains	Life domains are groups that separate common issues or behaviours that a person may need assistance with into categories.
NAHA	The National Affordable Housing Agreement provides the framework for the Commonwealth and the States to work together to improve housing affordability and homelessness outcomes for Australians.
NDCA	National Data Collection Agency is the national information system that combines information from both SHS Agencies and State/Territory and Commonwealth funding departments.
Non-conventional accommodation	Non-conventional accommodation is defined as: • Living on the streets • Sleeping in parks • Squatting • Staying in cars or railway carriages • Living in improvised dwellings • Living in the long grass

	This definition aligns closely with the cultural definition of primary homelessness.
Organisation	The legal entity that is funded to deliver a program and enters into the Service Agreement with the Department of Human Services
Presenting unit	A presenting unit is a client or group of clients that present together to a Specialist Homelessness agency. People who do not receive a service, and are therefore not clients, are not included in the presenting unit. This may include children who present with a parent or guardian but do not receive any services themselves. Presenting units may be: • A group including unrelated people • A person alone • A person with child/ren • A couple with child/ren • Siblings • Multi-generational family
Presenting unit head	The spokesperson or main contact person of a presenting unit. To be able to understand the composition of a group presenting to your agency it is important to be able to relate people within the group. This is done by relating the members of the group to a person who is nominated as the presenting unit head. If there is a child/ren under 18 years old present the presenting unit head is the spokesperson who is: • The parent/ guardian representing any child/ren under 18 years old • The most direct relation to any child/ren if there is no parent/ guardian present • If there are no child/ren under 18 years old present the presenting unit head is the spokesperson who is: • The spouse/ partner of another person within the presenting unit • Related in some way to another person within the presenting unit
Service Referral	A service referral occurs when a client needs a service that your agency is not able to provide. A service referral is then sent to another agency to provide that service.

Short-term or emergency accommodation	Short-term or emergency accommodation includes: • Refuges • Crisis shelter • Couch surfing • Living temporarily with friends and/or relatives • Insecure accommodation on a short-term basis • Emergency accommodation arranged by a Specialist Homelessness agency (e.g. hotels, motels etc.) The following short-term accommodation options are not considered to be homeless: • Hotels, motels, caravan parks and other temporary accommodation used when a person is on **holiday or travelling** • Custodial and care arrangements, such as prisons or hospitals • Temporary accommodation utilised by a person while renovating usual residence or building a new residence (e.g. weekenders, caravans) This definition aligns closely with the cultural definition of secondary homelessness.
Specialist Homelessness Services Collection (SHSC)	The SHSC provides information about all people, both adults and children, who seek assistance from specialist homelessness agencies. It is comprised of a client collection and an unassisted persons collection. The AIHW manages the collection of data and produces reports on the data to all stakeholders.
Support period	The period a client receives services from your agency is referred to as a support period. A support period starts on the day the client first receives a service from your agency. A support period ends when: • The relationship between the client and your agency ends • The client has reached their maximum amount of support your agency can offer • A client has not received any services from your agency for a whole calendar month and there is no ongoing relationship Where a client has an appointment with your agency which is more than one calendar month in the future it is not necessary to close the support period. This is because it is expected that there is an ongoing relationship with the client. There may still be work undertaken in the intervening period on the client’s behalf, such as checking on the client or updating case notes, and this should be recorded as services provided.

	The end of a support period is the day the client last received services from your agency.
Unassisted person	An unassisted person is any person who seeks services from a Specialist Homelessness agency and does not receive any services. A child who seeks a service but does not receive a service would be considered an unassisted person also.