CaseWorthy Street Outreach Portal

Welcome to the CaseWorthy (CW) Street Outreach Portal

The Street Outreach Portal is a powerful tool that supports the Homeless Management Information System (HMIS) and Coordinated Entry.

The CW Street Outreach Portal is designed for Outreach Staff to use while working with clients. It offers features such as:

- Encampment functionality
- Location Capture
- HMIS SO Intake completion

and other convenient tools to support outreach efforts.

Note: The data collected with the Street Outreach Portal is stored in the same database as the primary CaseWorthy application, ensuring data integrity and consistency across various HMIS programs.

Project Start Date:

- The date of first contact between the Case worker and the client.
- Project Start is recorded in HMIS using Project Start Date (data element 3.10).
- Required fields at Project Start are:
  - Name, Relationship to HoH, Client Location and Living Situation in the Entry Assessment.
  - Additionally, a 'contact' (Current Living Situation) must be entered under the Case Management tab.
  - If an ROI is not signed yet, the enrollment must be set to 'not shared'
- Data Quality monitoring is not enforced at this time.

Current Living Situation (Contact)

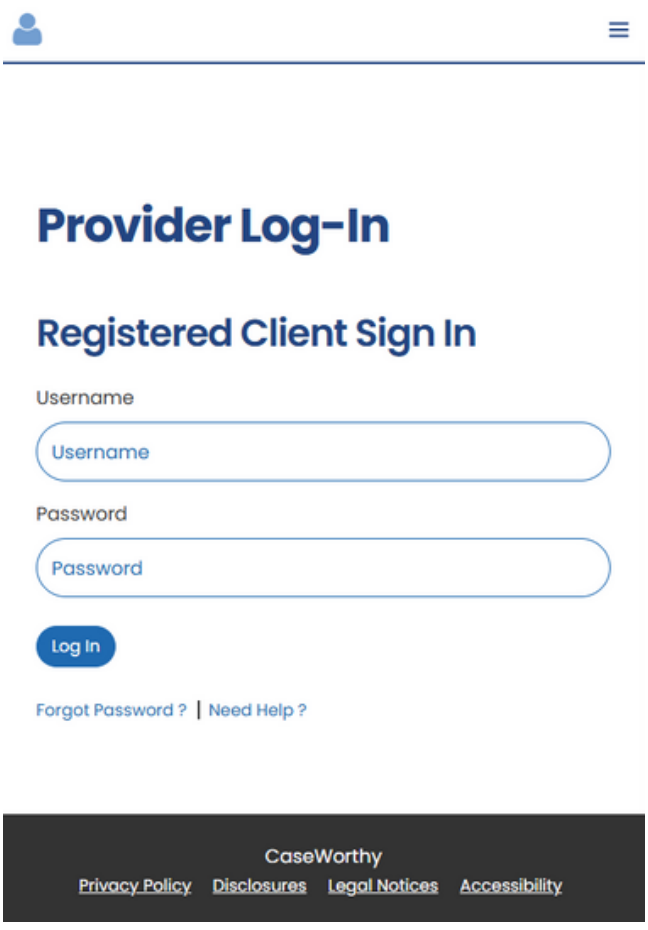
- A street outreach project is expected to record every contact made with each client in the HMIS via 4.12 Current Living Situation.
- A contact is defined as an interaction between a worker and a client designed to engage the client.
- Contacts may include activities such as:
  - A conversation between the street outreach worker and the client about the client's well-being or needs
  - An office visit to discuss their housing plan
  - A phone call, or a referral to another community service
- A contact must be recorded every time a client is directly contacted by the Outreach Staff, including when an engagement date or project start date is recorded on the same day.
- Contacts are recorded in HMIS using Current Living Situation (data element 4.12).

CaseWorthy Street Outreach Portal

How to Access the Street Outreach Portal

Login: Use the same HMIS Username and Password to log in to the Street Outreach Portal
This Street Outreach Portal is designed for use with Desktop/ Laptop/ Think Pad or Smartphone.
Users must be granted access by the HMIS Lead Agency in order to access the Portal. To request access, please submit a ticket to HMIS.Support@havenforhope.org

https://prod.caseworthy.com/CaseWorthy/PortalDefault.aspx?DatabaseID=4323&#/PortalDefault



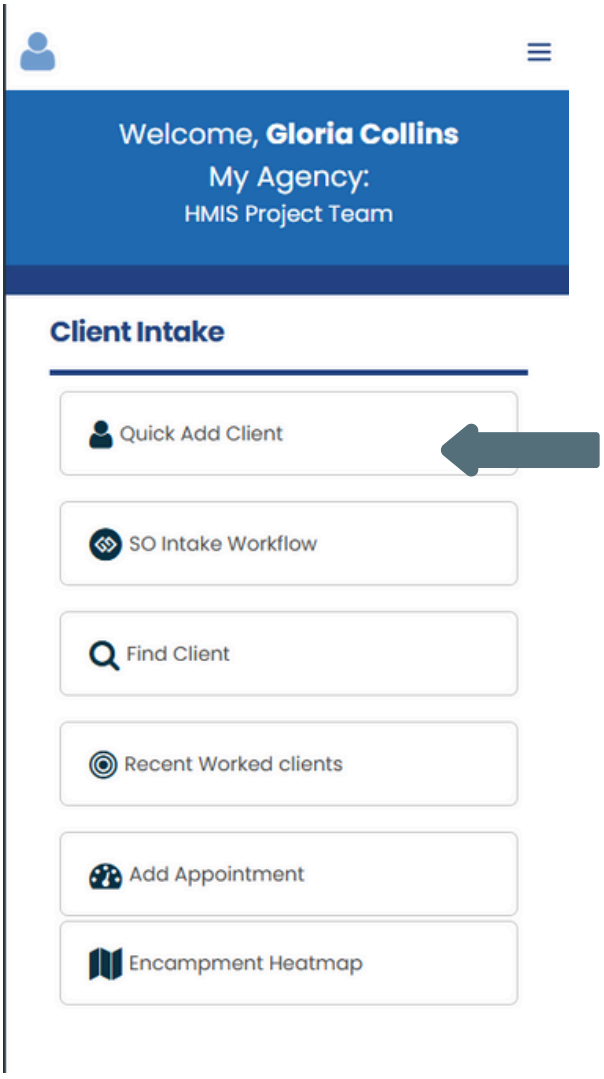
Street Outreach Portal: Home Dashboard

The Home dashboard includes the most common components to help you manage the data collected using the Street Outreach Portal.

Users can quickly access:

- Quick Add Client
- SO Intake Workflow
- Find Client
- Recent Worked Clients
- Add Appointment
- Encampment Heatmap-(Encampments can only be created by supervisor/manager/director)

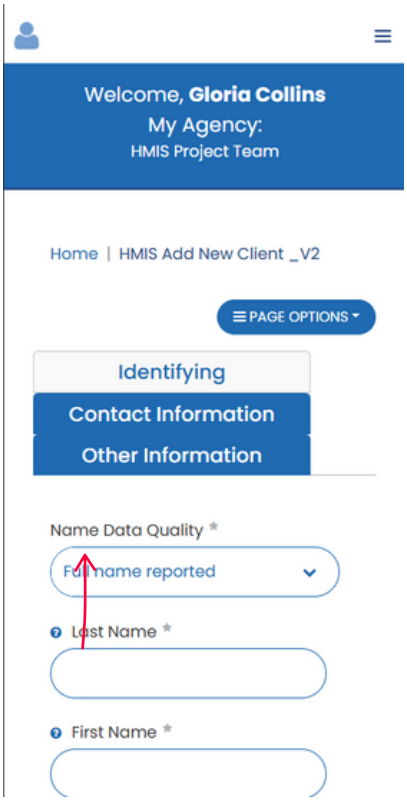
1.



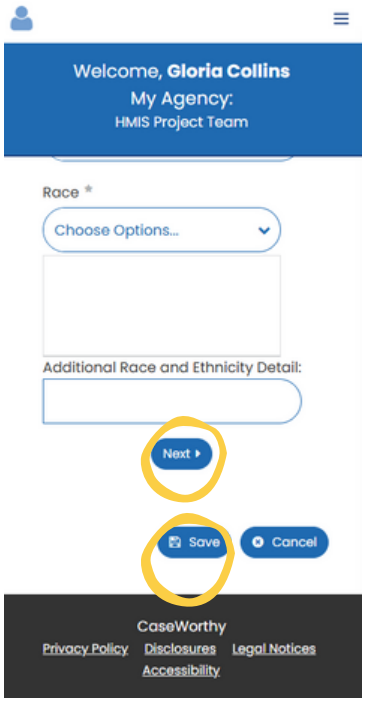
Street Outreach Portal: Quick Add Client

Identifying Information:

2.



3.



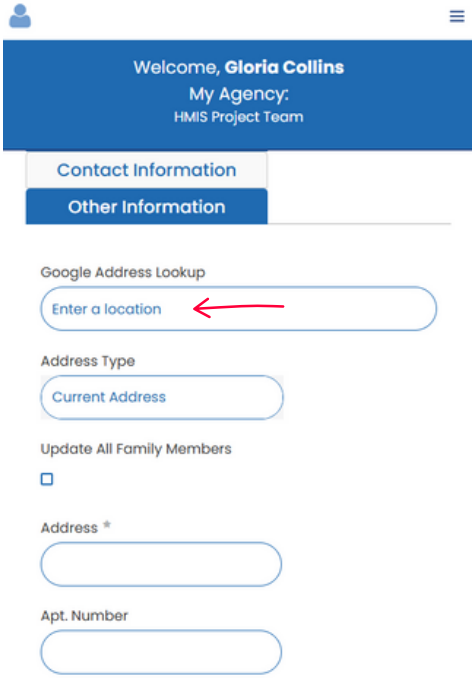
Name Data Quality: the drop down arrow gives you the option to select:

- Full name Reported (you can fill in the name with description if needed)
- Partial, street name, or code name reported
- Client Doesn't know
- Client prefers not to answer
- Data not collected
- Any drop down arrow provides mulitple options, please view them and select from them.
- Add whatever information the client is comfortable sharing.
- If you see that you are encountering an answer that is NOT part of the options listed, please submit a ticket to the HMIS team.
- You must always check for Duplicates when adding a client. This prevents the problem of having mulitple accounts for the same user.
- When you do it will take you to a new screen" Duplicate check result, make your selection then you will return back tolf the client is deceased, please use the most accurate date to your knowledge. the page you were working on.
- You will use **NEXT** to move through the screens to provide as much information as possible.
- You will use **SAVE** when you have entered what ever information you have for the "Quick Add Client" and are ready to move to the next tab

Quick Add Client -Cont.

Contact Information:

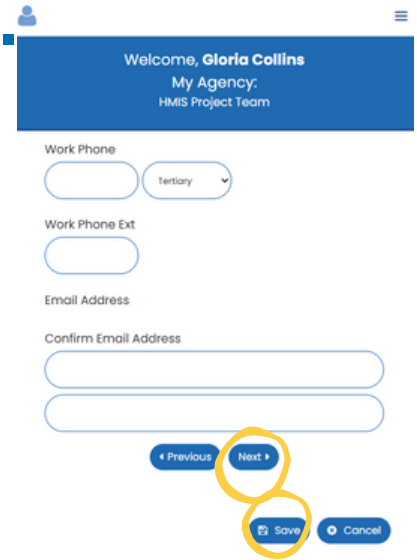
4.



- Any drop down arrow provides mulitple options, please view them and select from them.
- If you see that you are encountering an answer that is NOT part of the options listed, please submit a ticket to the HMIS team.

- If you do not know the address you have the option to select
- MAP IT and it will use your location on your phone to provide you with a map of the possible address of where you are located.
- You must verify the address.
- Once you click this button it will take you to a new screen;
- GEO Code Result- to verify the address you have entered, then it will return you back to the main screen.

5.

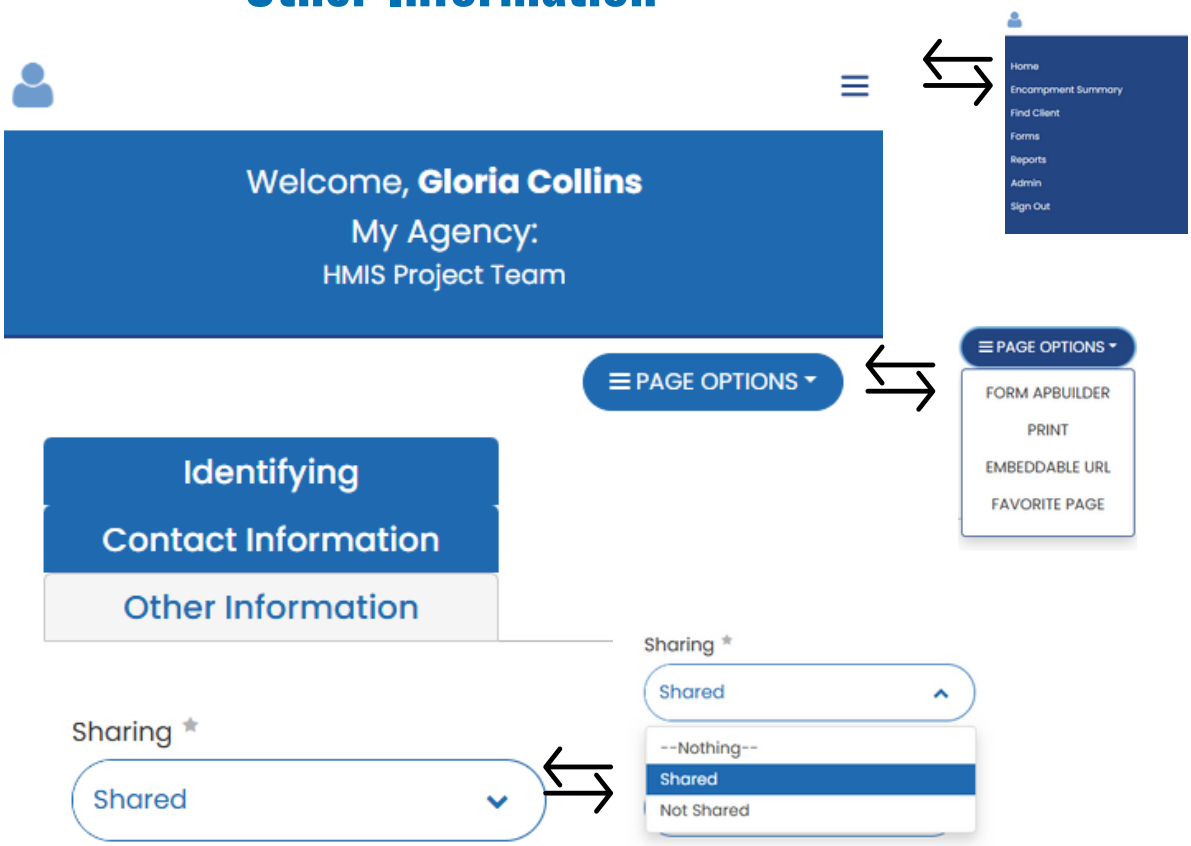


If you do not have additional data to add, you may click **SAVE** and this will end The Quick Add Client.

Quick Add Client

- **Other Information**

8.



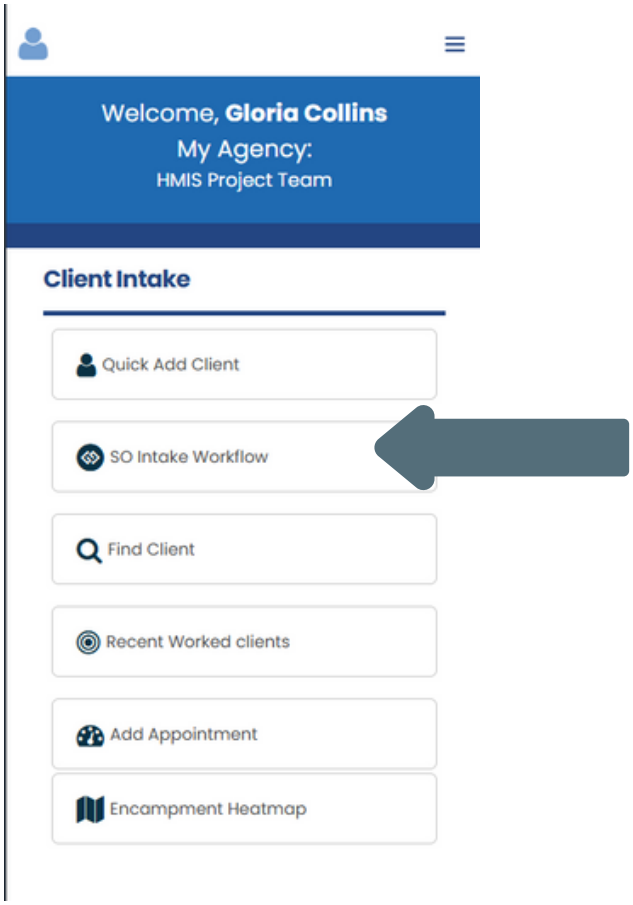
Sharing:

- If the client has NOT signed the ROI (Release Of Information) you MUST change the setting to NOT SHARED!
- Only leave it on Shared if client HAS signed the ROI.

If you do not have additional data to add, you may click SAVE and this will end The Quick Add Client.

Please keep in mind: Quick Add Client is only when creating a profile! You will not add the enrollment here.
The enrollment is add in SO Intake Workflow (next page).

SO Intake Workflow

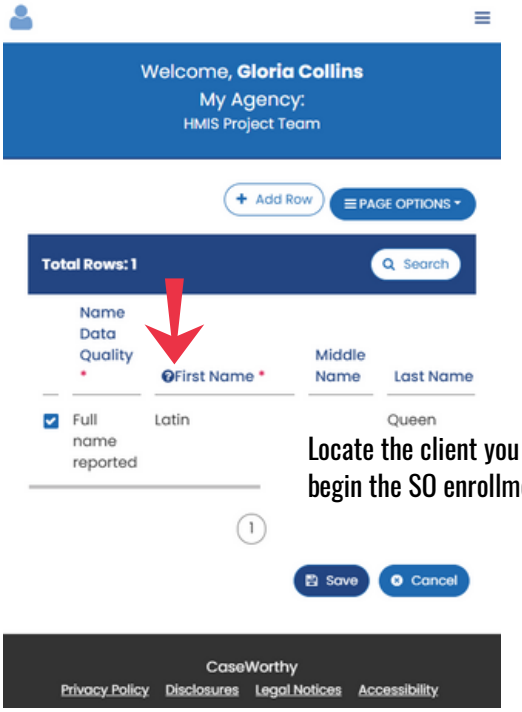


The first 3 steps of SO Intake Workflow are the same as steps 2-10 listed on pages 2-5.

When you are ready to do an SO Intake Workflow you now have the time and the clients information to start, edit and complete the Street Outreach enrollment along with all the required assessments.

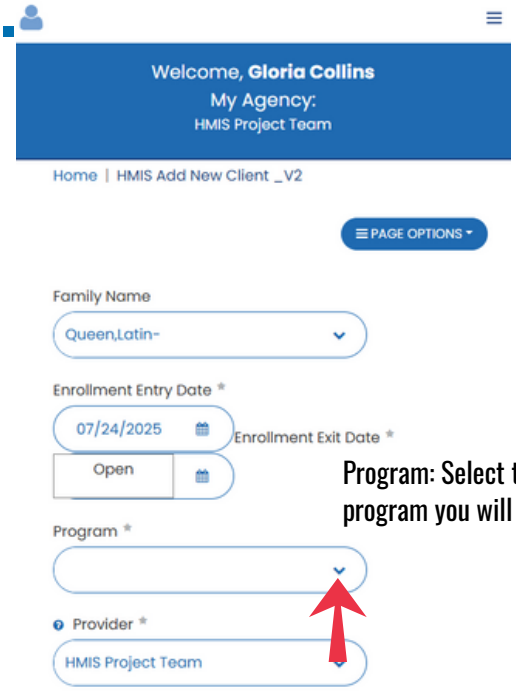
SO Intake Workflow Cont.

1.



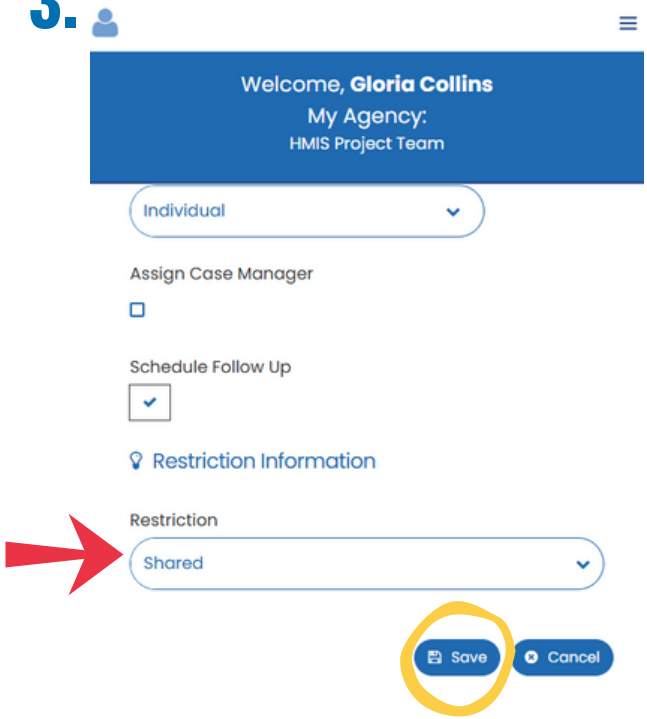
Locate the client you are going to begin the SO enrollment.

2.



Program: Select the Street Outreach program you will be enrolling the client in.

3.



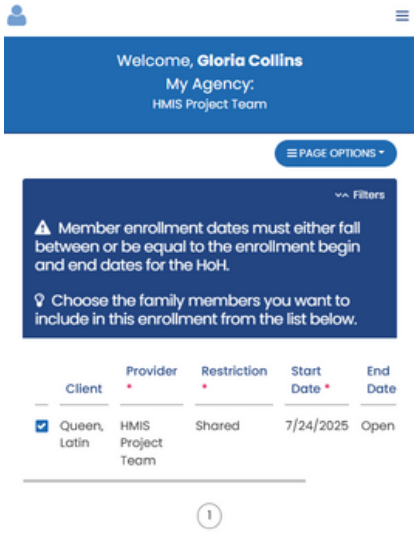
Sharing:

- If the client has NOT signed the ROI (Release Of Information) you MUST change the setting to
- NOT SHARED!
- Only leave it on Shared if client HAS signed the ROI.

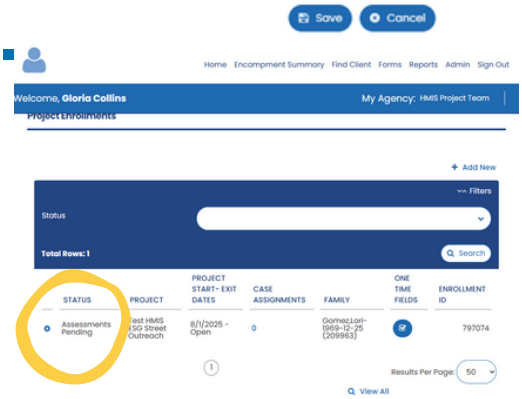
If you do not have additional data to add, you may click SAVE and this will move you through the SO Intake Workflow.

SO Intake Workflow Cont.

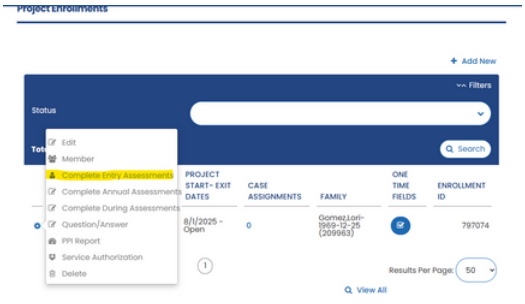
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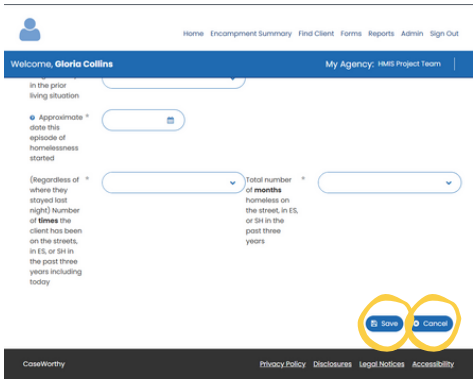
5.



6.



7.



Once you have completed step 3 of the So Intake Workflow this will be the beginning of the assessments for this client.
If the client is already in the system and you need to go back in to complete it.

- Locate the client (Step 4)
- Click Assessment Pending (step 5)
- Complete Entry Assessments (step 6).
  - If you do not have additional data to add, you may select Data Not Collected, Client Doesn't Know, or Client Prefers Not To Answer, then click SAVE and this will move you through the SO Intake Workflow.
- If you click on Cancel it will stop the current assessment and take you to the next assessment (step7).
- If you click on Home it will take you out of the assessment and return you to the main page (step 7).

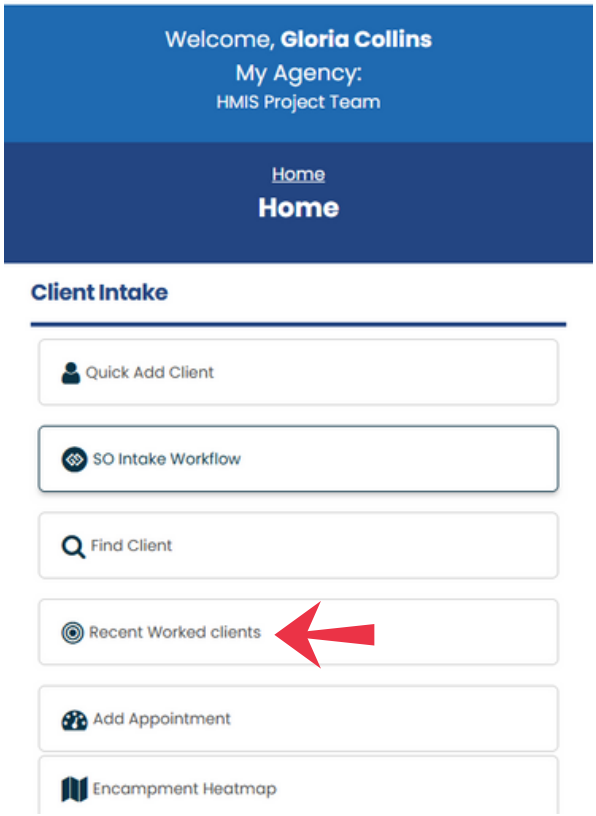
CASEWORTHY STREET OUTREACH PORTAL

Recent Worked Clients & Client Dashboard Overview

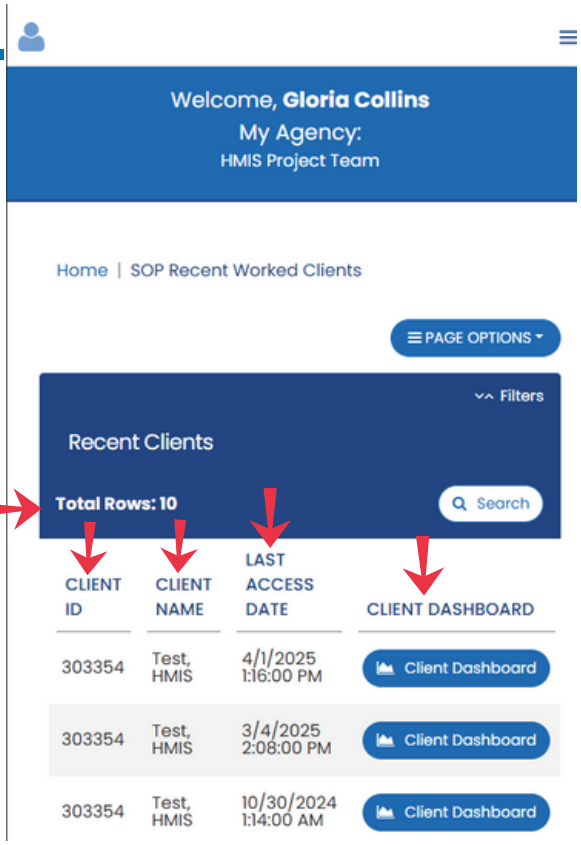
Recent Worked Clients

Note: A client will only appear here if the current user created a Current Living Situation for the client**

1.



2.

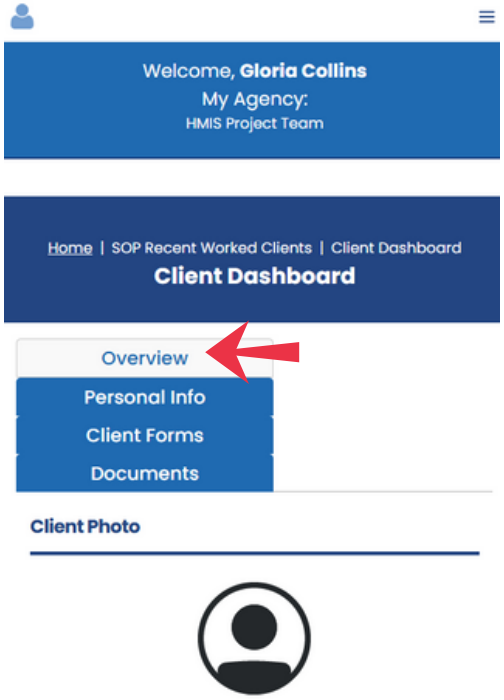


Once you click on Recent Worked Clients it will display a list of the clients you have previously worked with. It will display;

- Total rows
- Client ID
- Client Name
- Last Access Date
- Client Dashboard

Client Dashboard Overview:

3.



Once you click on Client Dashboard you will see options such as:

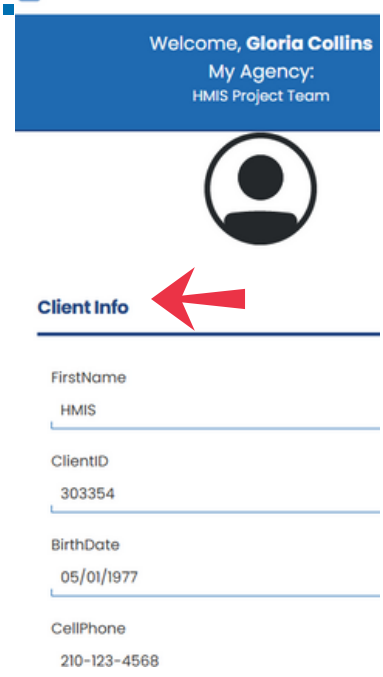
- Overview
  - Client Info
  - Barred From Programs or Services
  - Quick Links
  - Services
- Personal Info
- Client Forms
- Documents

CASEWORTHY STREET OUTREACH PORTAL

Client Dashboard cont.

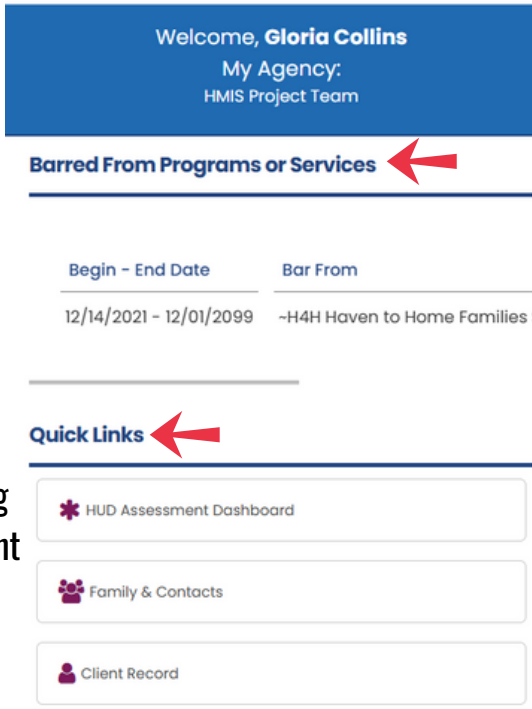
Client Info, Barred From Program or Services, Quick Links, Services & Project Enrollments

4.



Client Info- This has the clients basic information such as Name, DOB, Cell number etc .

5.



Barred From Program or Services- This will list the "begin - End date" and the program they are bar from.

Quick Links will provide you with a quick way of viewing

- HUD Assessment Dashboard
- Family & Contacts
- Client Record

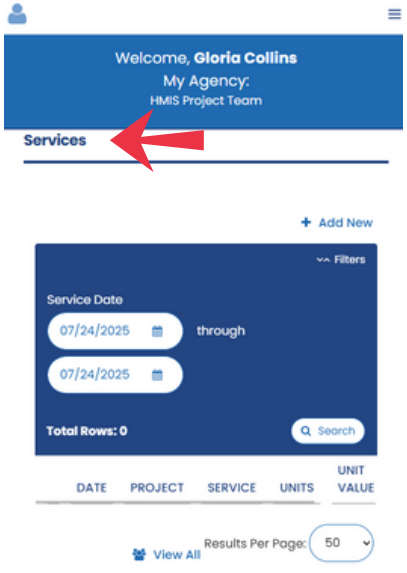
Services: You have the option to add a new service with the

- + Add New

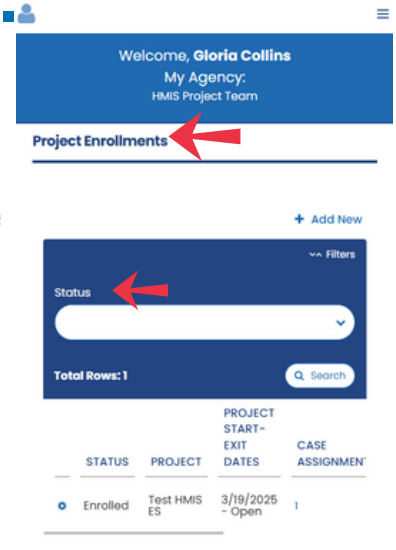
or look up a service by

- Entering the Service Date and clicking Search.

6.



7.



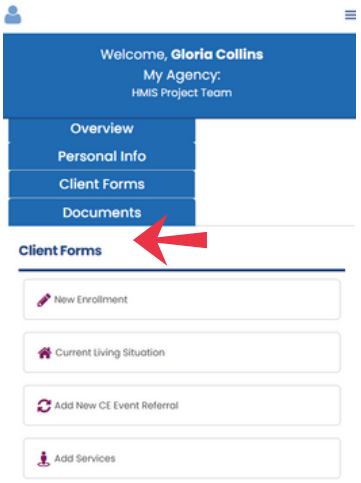
Project Enrollments: You are able to review a client's current and previous enrollments with the status:

- Assessments Pending
- Enrolled
- Exited

CASEWORTHY STREET OUTREACH PORTAL

Client Dashboard cont.
Personal Info., Client Forms, Summary Forms & Documents

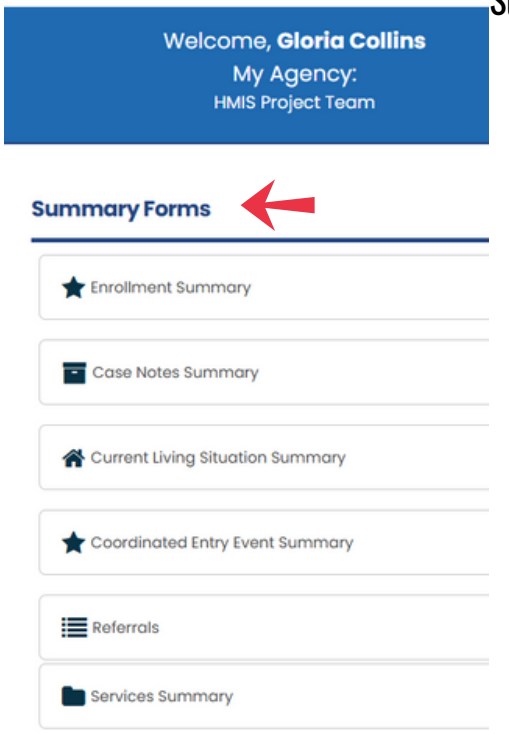
8.



Client Forms:

- New Enrollment
- Current Living Situation
- Add New CE Event Referral
- Add Services
- Referral to Another Provider
- Veteran Information
- Add Case Note
- Release of Information Summary
- Address History

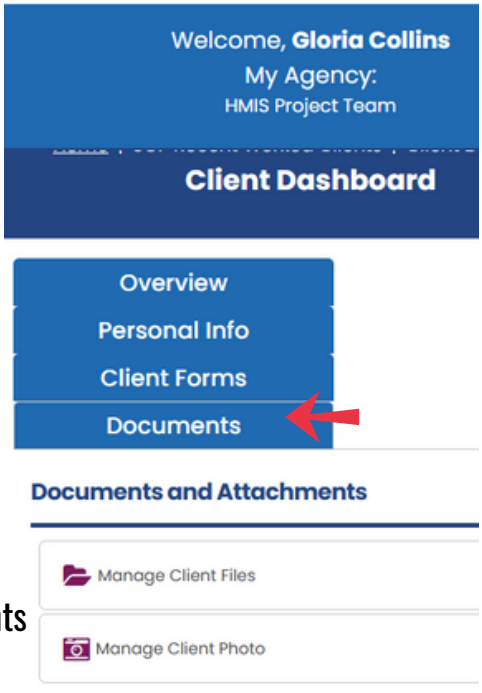
9.



Summary Forms:

- Enrollment Summary
- Case Notes Summary
- Current Living Situation Summary
- Coordinated Entry Event Summary
- Regerra;s
- Services Summary

10.



Documents & Attachments

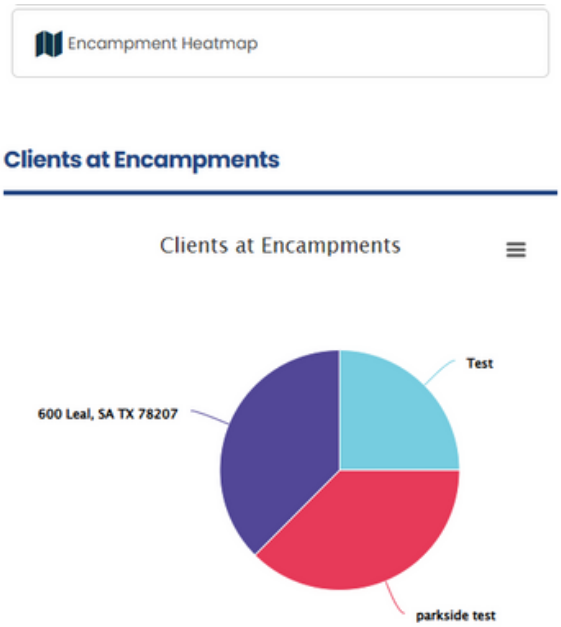
- Manage Client Files
- Manage Client Photo

Encampments:

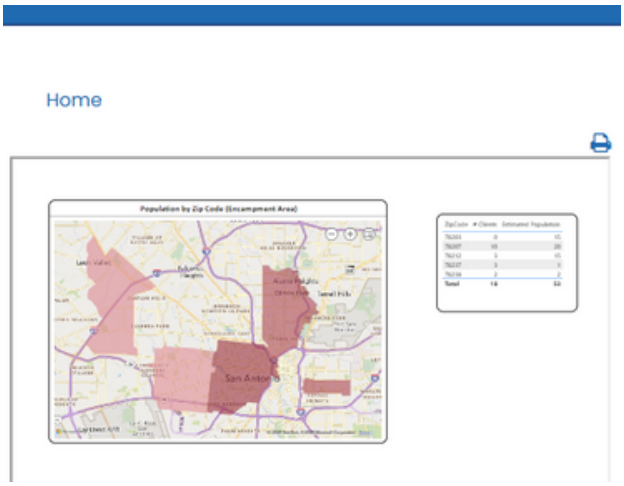
The Encampment framework is another innovative aspect of the Street Outreach Portal that offers a structured approach to help document and manage the complexities of encampments used by individuals experiencing homelessness.

Add Encampment:

New Encampments can be added by Managers/Supervisors/Directors.



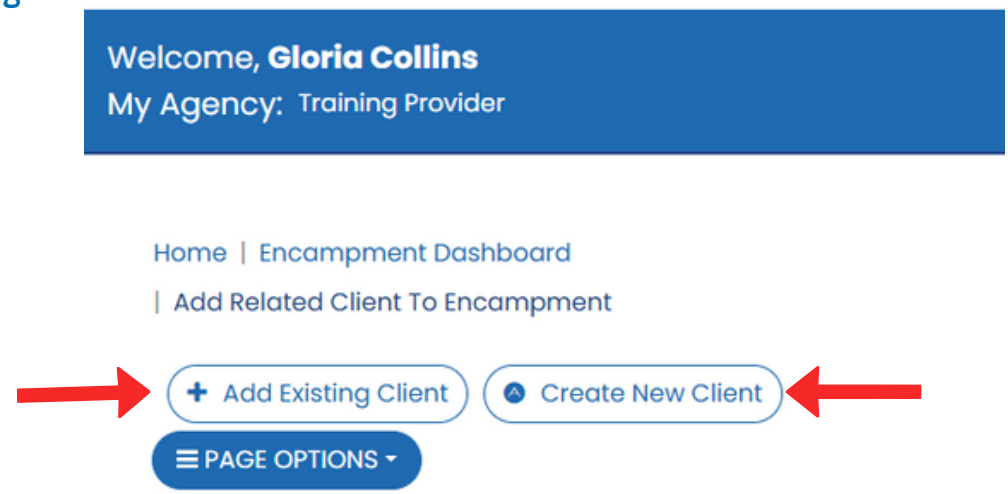
The Encampment Heatmap provides a visual of the areas with the most populated encampments (The visual in this guide represents training data only)



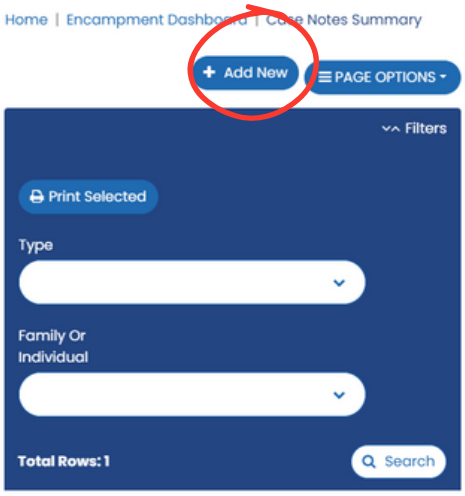
CASEWORTHY STREET OUTREACH PORTAL

Encampments

Add Clients to Encampments: Once the encampment is created and the client is enrolled into the Street Outreach program, users can add the client to the encampment that they are residing in.



Encampment Notes: This feature can be used to add helpful information about the encampment.
Note: Client PII should never be added to encampment notes.
Examples of information that could be added: Presence of pets, any weapons observed,



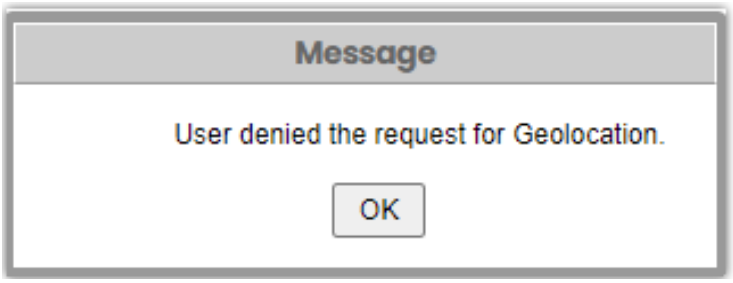
Encampment Project Services: This feature is designed to allow users to record the same service to multiple clients within an encampment. For example, if a Street Outreach worker is passing out hygiene kits to clients enrolled in their program at an encampment.

Troubleshooting

Problem:

You declined the pop up message from allowing the portal to identify your location.

You will get the message listed below.



(Your internet browser should display a pop-up message prompting you to ALLOW or BLOCK the portal from identifying your location.)

Solution:

Delete the browser's Browsing History, including the History, Cookies, and Cache to prompt the system to generate the 'Know your Location' message to ALLOW or BLOCK the Geolocation

Select ALLOW to enable the Capture Location, also referred to as 'Drop a Pin', in the portal. If BLOCK is selected, a notification will appear, and the Capture Location feature will not be available.