PASS

https://www.pass-system.ie/

Training Manual

HOMELESS agency

open sky data systems ltd

DOCUMENT HISTORY

Version:	Author:	Date:	Comments:
0.1	William Flanagan	26/11/2010	Initial Draft

1. CONTENTS

2. BACKGROUND

2.1. Purpose & Scope

The purpose of this document is to provide a training guide for the training workshops. This is not intended to be the in-line system help, which is provided as part of the system.

Note also that this document is not intended to provide an overview of the Pathway Model (which PASS is supporting). Please see the relevant documentation from the Homeless Agency website for further details on the Pathway model.

2.2. Support

The PASS System is co-ordinated by the Homeless Agency. In the event of any support requirements, please contact the PASS Co-ordinator Colm Moroney at 01 7036100.

2.3. Data Protection

PASS has been developed with the assistance of the Office of the Data Protection Commissioner (ODPC). Throughout the development process, the ODPC has been closely consulted on all aspects of PASS. ODPC have confirmed that PASS is fully compliant with the Data Protection Acts 1988 and 2003.

3. PASS – GENERAL

PASS is a role based system which governs a user's access to the system based on their role and project. A user may be assigned a combination of user roles, and may also be assigned to a number of projects within PASS.

3.1. Connecting to PASS

There are two versions of PASS which will be available, i.e. the Live site and the Training site.

3.1.1. Live Site

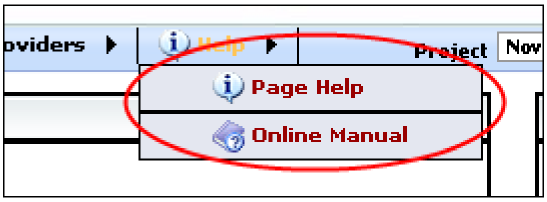
The URL to the Live PASS site is: https://www.pass-system.ie. Under no circumstances is test data to be entered on the Live site. Access to this site is strictly controlled by the PASS Co-ordinator and Project Managers.

3.1.2. Training Site

The URL to the PASS Training site is: https://www.pass-system.ie/Training. Users are free to enter test data on this site in order to learn the various features of the system.

3.2. Getting Help

As well as this training manual, users may also avail of the in-line help document which is integrated with the PASS site. This can be achieved by clicking on the help link in the upper menu, as shown below:



If user queries are not cleared up by this training manual, or by the in-line help, the user should contact the PASS Co-ordinator in the Homeless Agency (contact details provided at the beginning of this document).

3.3. User Roles

The following user roles are present in the NHSS system:

Role Name	Description	Functions
System Administrator (SA)	The sys admin will typically be a user from Open Sky or the Homeless Agency, and will be responsible for managing all	• Manage Organisations/Projects/Users • Manage Reference Data

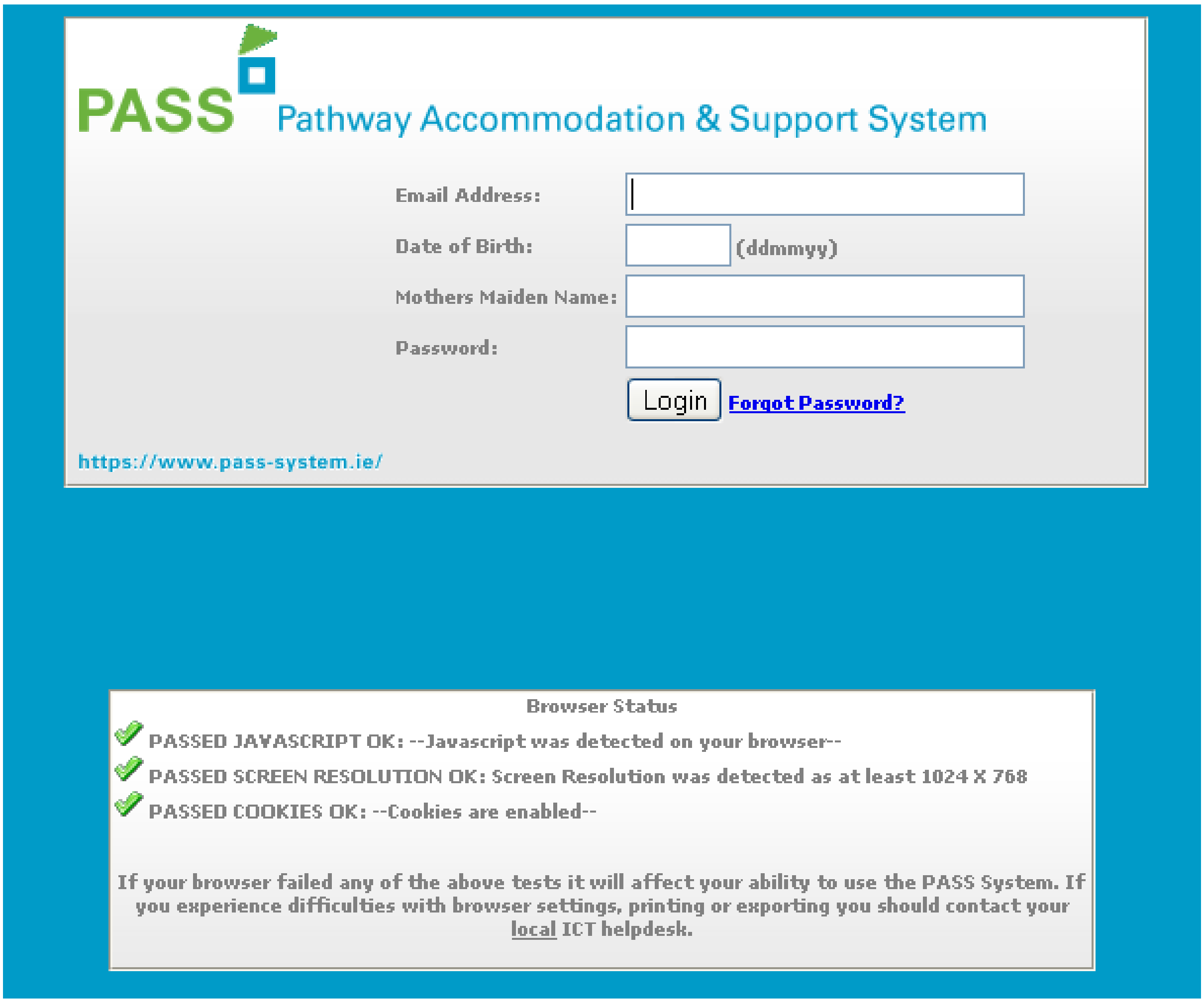
Role Name	Description	Functions
	reference data, user data, as well as having the ability to manage any client data within the system	• Manage All clients in all regions • View the system audit trail
Regional Administrator (RSA)	The Regional Administrator will have a similar role to that of the System Administrator, with the exception that they will be restricted to the regions that they are a member of.	• Manage Organisations/Projects/Users within a region • Manage All clients in a region • View the system audit trail for their region
Project Manager (PMG)	A Project Manager is the responsible person for a project. A Project Manager can be assigned to multiple projects, which means they will be a manager in all of those projects.	• Assign users to their project • Manage clients in their project • Manage their CPS (if providing accommodation)
Project Worker (PWR)	A Project Worker is usually the user who will have most interactions with the client, and will be responsible for recording the usage of services by the client within PASS	• Manage clients • Manage all client interactions • Assume KeyWorker/Case Manager roles for a client
Freephone Manager (FPOM)	The Freephone Manager has all the functionality available to them as the Freephone Operator, but can also add Freephone users to their project	• Manage CPS availability • Manage FPO users in their project(s)
Freephone Operator (FPO)	The Freephone Operator is usually the initial point of contact with a client if their contact with PASS is out of hours. The freephone operator will make the booking, and update CPS availability, and perform initial assessment.	• Manage Bookings • Manage CPS Availability • Manage initial assessment
Local Authority Operator (LAO)	The Local Authority Operator is usually the initial point of contact with a client if their contact with PASS is within working hours. The freephone operator will make the booking, and update CPS availability, and will also perform the follow up assessment for the client. The LAO also has access to all the functionality available to the project worker (PWR)	• Manage Bookings • Manage CPS Availability • Manage follow up assessment • Manage Client
Local Authority Manager (LPOM)	The Local Authority Manager has all of the functionality available to the LPO, but can also assign LPO's users to their projects.	• Assign LPO users to project • Manage Bookings • Manage CPS Availability • Manage follow up assessment

Role Name	Description	Functions
		• Manage Client
System Researcher (SRES)	The System Researcher can interrogate the national database and generate reports based on this. (Not covered in this training session)	• Create reports based on national data • Publish reports
Regional Researcher (RRES)	The System Researcher can interrogate the database on a regional level and generate reports based on this. (Not covered in this training session)	• Create reports based on regional data • Publish reports

3.4. PASS – Login

PASS is a fully web based system. In order to log in to PASS, you must have a user account set up in advance by your project manager or system administrator.

The login screen is shown below:



Note the initial check for browser compatibility at the bottom of the login screen. If any of these checks do not present the user with the ✔ icon, you should check your browser settings or contact ICT support.

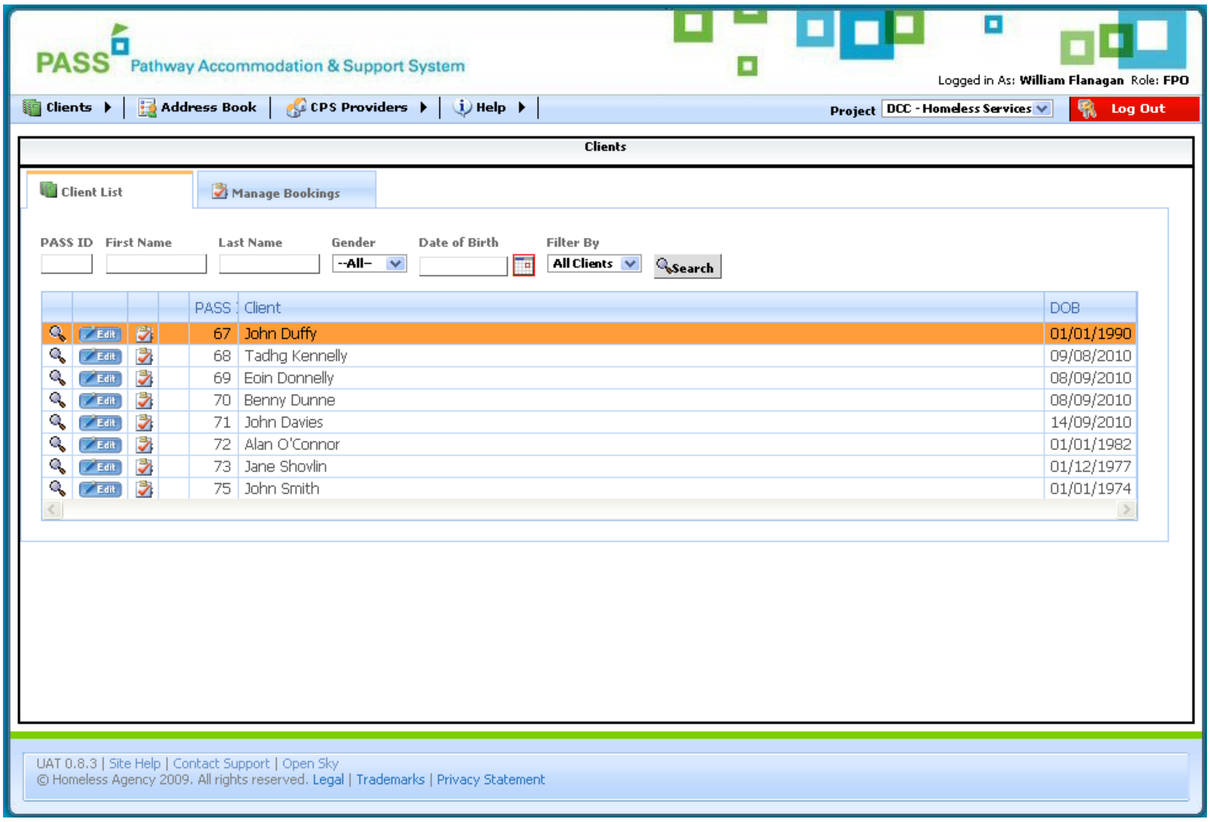
The login credentials required are:

Field	Description
Email Address	The user's email address
Date of Birth	The user's date of birth in ddmmyyyy format, e.g. 11th October 1974 = 111074
Mother's Maiden name	The user's mother's maiden name
Password	The user's password. The password must be at least 8 characters in length and must contain at least 2 numeric characters. Passwords are valid for 90 days, whereupon the system will force the user to change their expired password to a new password.

If you forget your password, simply enter your email address, date of birth, Mother's maiden name, and then click the "Forgot Password" link on the login page, and a password reminder will be emailed directly to you.

Note: *If three consecutive un-successful attempts are made by a user to login, their account will be locked, and can only be un-locked by the Project Manager or System Administrator.*

Having successfully logged in, you will be presented with the Client Search screen.



(Note that if you are a project worker with a project that provides emergency accommodation, the "Manage Bookings" tab will be automatically selected).

3.4.1. Exercise

Login in to the system.

NOTES

3.5. General Navigation

In order to navigation your way around the system, you will be presented with a menu on the top of the screen presenting all of the PASS features that are available to you, as shown below:

For example, if you hover the mouse over the "Clients >" link, you will be presented with two options to either search for a client or create a new client.

If you are a project worker that works on multiple projects, you should take care to ensure that you select the current project that you are recording data against from the "Project" dropdown list in the upper right corner of the screen:

To the right of the project dropdown is the "Log Out" button.

Note: *You should always ensure that you log out of the system when you are not using it to ensure that un-authorised access to PASS is prevented.*

3.5.1. Exercise

Once logged in to the system, navigate across the different screens available using the top menu bar. Ensure that your project is correctly displayed in the project dropdown. Log out of the system (this will take you back to the login screen).

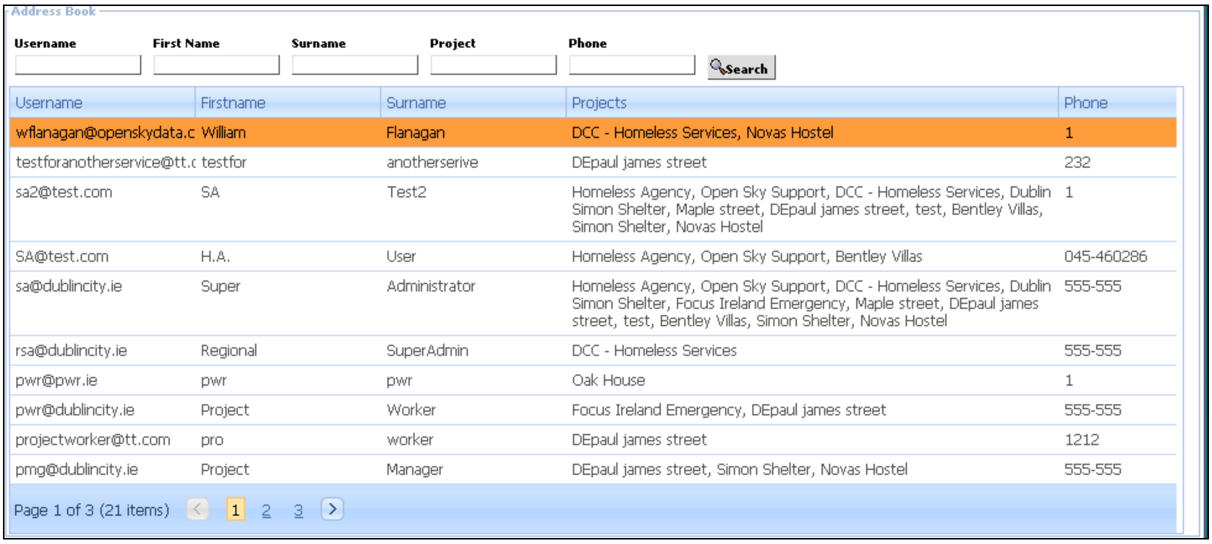
NOTES

4. Address Book

The Address Book is a very convenient method provided by PASS for bringing service workers from different organisations together. Essentially, the PASS Address Book will become a Contacts database for the entire Homeless sector in Ireland.

4.1. Searching the Address Book

By clicking the "Address Book" link in the upper panel, the user is presented with the following screen:


Address Book

Username | First Name | Surname | Project | Phone | Search

Username	Firstname	Surname	Projects	Phone
wflanagan@openskydata.c	William	Flanagan	DCC - Homeless Services, Novas Hostel	1
testforanotherservice@tt.c	testfor	anotherserive	DEpaul james street	232
sa2@test.com	SA	Test2	Homeless Agency, Open Sky Support, DCC - Homeless Services, Dublin Simon Shelter, Maple street, DEpaul james street, test, Bentley Villas, Simon Shelter, Novas Hostel	1
SA@test.com	H.A.	User	Homeless Agency, Open Sky Support, Bentley Villas	045-460286
sa@dublincity.ie	Super	Administrator	Homeless Agency, Open Sky Support, DCC - Homeless Services, Dublin Simon Shelter, Focus Ireland Emergency, Maple street, DEpaul james street, test, Bentley Villas, Simon Shelter, Novas Hostel	555-555
rsa@dublincity.ie	Regional	SuperAdmin	DCC - Homeless Services	555-555
pwr@pwr.ie	pwr	pwr	Oak House	1
pwr@dublincity.ie	Project	Worker	Focus Ireland Emergency, DEpaul james street	555-555
projectworker@tt.com	pro	worker	DEpaul james street	1212
pmg@dublincity.ie	Project	Manager	DEpaul james street, Simon Shelter, Novas Hostel	555-555

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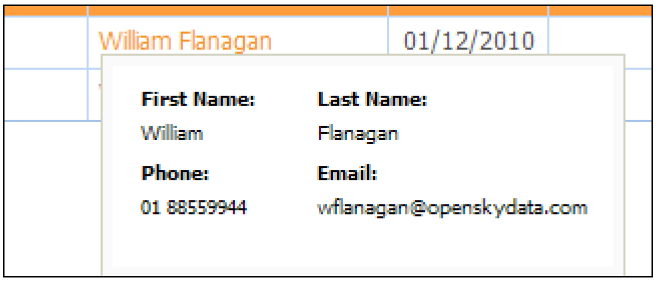
This screen presents a list of all PASS users, which can be filtered on the following fields:

Field	Description
Username	The user's PASS login name (usually their email address)
First Name	Search by the user's first name
Surname	Search by the user's last name
Projects	This field enables you to search for users within a particular project
Phone	Search by the user's phone number

Note: *PASS supports partial matching of search criteria, e.g. entering "Mcca" in the last name search box, would return user's with surnames such as McCarthy, McCann, McCartney, etc.*

As well as the searchable Address Book, PASS also provides a simple mechanism to get contact details of other PASS users throughout the site. Simply hover over a username wherever you see one on the PASS site, and you will be shown the user's contact details. See below for an example:



4.1.1. Exercise

Once logged on to the system, click the Address Book link and then enter some search criteria to perform a search.

NOTES

5. General Client Management

At the core of the PASS System are the features for managing clients' accommodation and services.

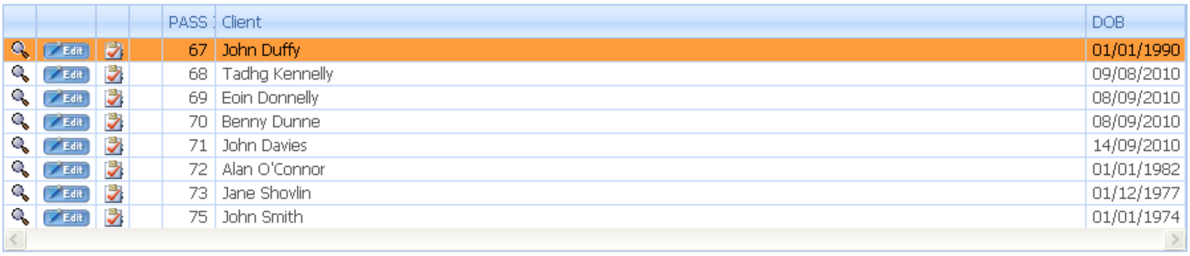
5.1. Searching for a Client

When you log in to the system, enter search criteria in the boxes shown below and then click the "Search" button:

This presents the following search criteria:

Field	Description
PASS ID	PASS allocates a unique ID to each client added to the system. If you know the PASS Id of the client you are searching for, enter it in this box and click search.
First Name	Search by the client's first name, or part of the client's first name
Last Name	Search by the client's first name, or part of the client's last name
Gender	Enter the gender search criteria in this dropdown box
Date of Birth	Search by the client's Date of Birth (must be exact)
Filter By	If you input "All Clients" in this dropdown, the search criteria will be applied across all of the clients within the system. If you enter "My Clients" in this dropdown, the search will be restricted to clients that you have worked on in your project work.

Having entered you search criteria, you will be presented with a data-grid containing your search results, as shown below:



			PASS	Client	DOB
	Edit		67	John Duffy	01/01/1990
	Edit		68	Tadhg Kennelly	09/08/2010
	Edit		69	Eoin Donnelly	08/09/2010
	Edit		70	Benny Dunne	08/09/2010
	Edit		71	John Davies	14/09/2010
	Edit		72	Alan O'Connor	01/01/1982
	Edit		73	Jane Shovlin	01/12/1977
	Edit		75	John Smith	01/01/1974

On the left hand side of the search data-grid, there are a number of icons, which are described as follows:

Icon	Description
	This icon allows you to view a print friendly view of the client's case. This is a read-only view.
	The edit icon allows you to navigate directly to the main management screen for this client where you can manage all your projects services for this client. This is discussed in greater detail later in this manual.
	If the client has been registered on PASS in a different region, this icon will be visible. Should you wish to record and manage data for that client in your region, you should click this icon. Note that the client will remain visible in the previous region for 6 months following the transfer.
	If you are a user that manages the Freephone for the CPS, you will see this icon next each client, and this will allow you to create Emergency Accommodation bookings for clients on the CPS. This is discussed in greater detail later in this manual.

5.1.1. Exercise

Once logged on to the system, click the search icon and then enter some search criteria to perform a search.

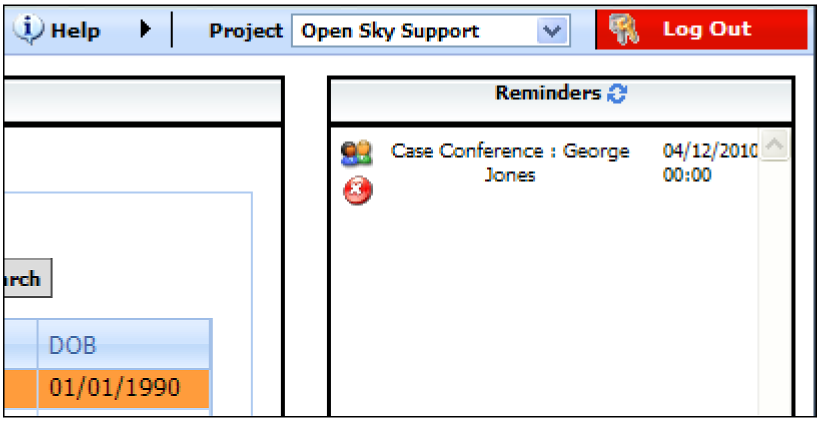
NOTES

5.2. Client Reminders

If you are a project worker or project manager, you will have a "Reminders" area on the right hand side of your screen after you log in. This panel contains a set of system generated reminders. The following is a sample of the reminders that can be generated by the PASS system:

Reminder	Description
Case Meeting	If you have been invited to a Case Meeting that is due to begin within the next 7 days.
6 Month Warning	If a client that you are working with has been in emergency accommodation for more than 6 months without a tenancy
Support Plan Actions	If you have been assigned a support plan action that has been targeted within the up-coming 7 days, you will receive a reminder.
Support Plan Reviews	If you are the support plan owner, you will receive an alert within 7 days of the planned review date of a support plan review

The following screenshot shows a user's reminder that relates to an up-coming Case Meeting:



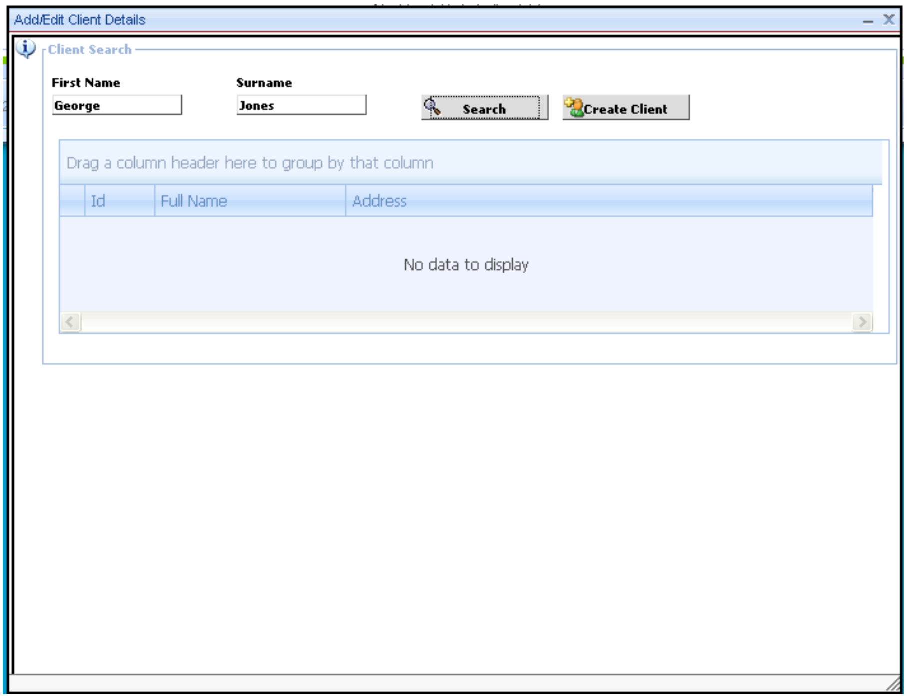
The icons are described as follows:

Icon	Description
	Go directly to the client management screen for this client.
	Dismiss this reminder

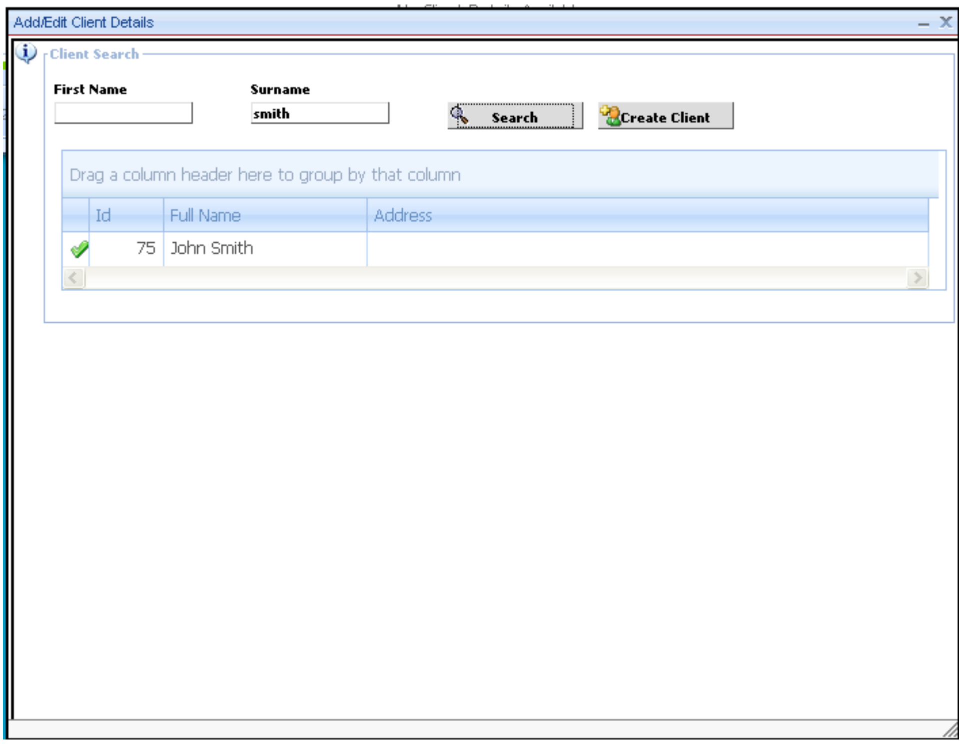
5.3. Adding a Client (No Consent)

To add a client, you must click the New Client link from the upper navigation menu.

You will first be prompted to search PASS for an existing client before being allowed to add a new client:

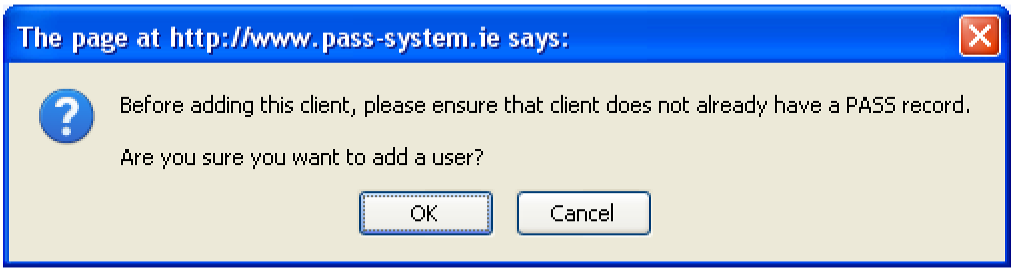


Enter the details of the Client whom you wish to add to the index. If the client already exists in the system, you will be shown the matching results:



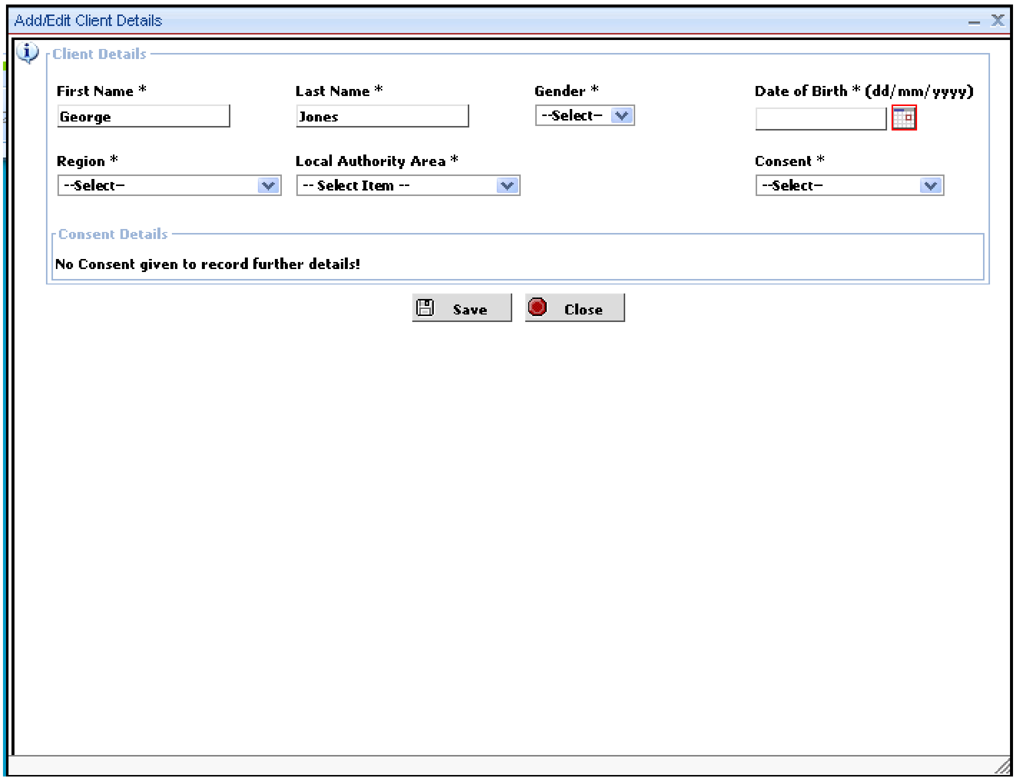
If the client you wish to add is among the list of results shown, there is no need to add the client again – just click the select icon to view the edit screen for this client.

If the client is not among the list of search results, click the "Create Client" button. When adding a new client, PASS will prompt you to ensure that you have searched the database for the client first, as shown below:



Click "OK" to add the user, or Cancel to go back to the search.

If you click "OK", you will be presented with the following screen:

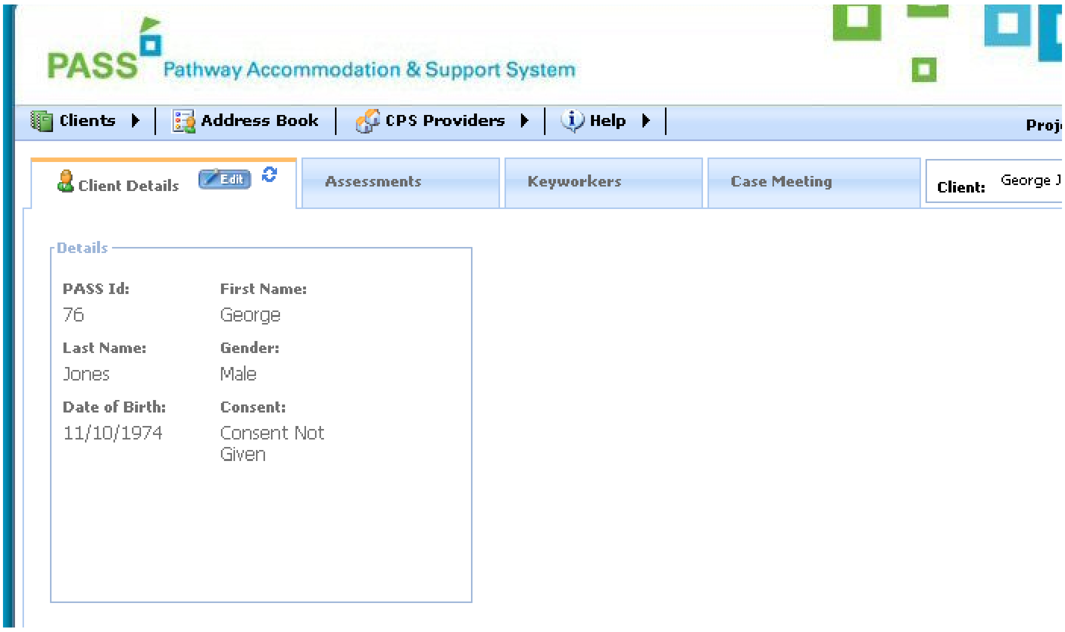


The following fields are requested, and ALL are required:

Field	Description
First Name	The client's first name
Last Name	The client's last name
Gender	The client's gender
Date of Birth	The client's date of birth
Region	The region of the country in which the client will be accessing services
Local Authority Area	The local authority area whose services the client will be accessing
Consent	Whether or not the client has given consent to have anything greater than the minimum dataset recorded on PASS

Note: *Consent is a crucial aspect of PASS. If a client does not explicitly consent, only their minimum dataset can be recorded on the database. The detail shown above represents the minimum dataset. While you can record the client's access to emergency accommodation, no other data can be recorded.*

Once you save the details, you will be presented with the following screen:



5.3.1. Exercise

Once logged on to the system, click the Add Client icon and then enter some search criteria to perform a search. Add a new client **without** providing consent and save the details.

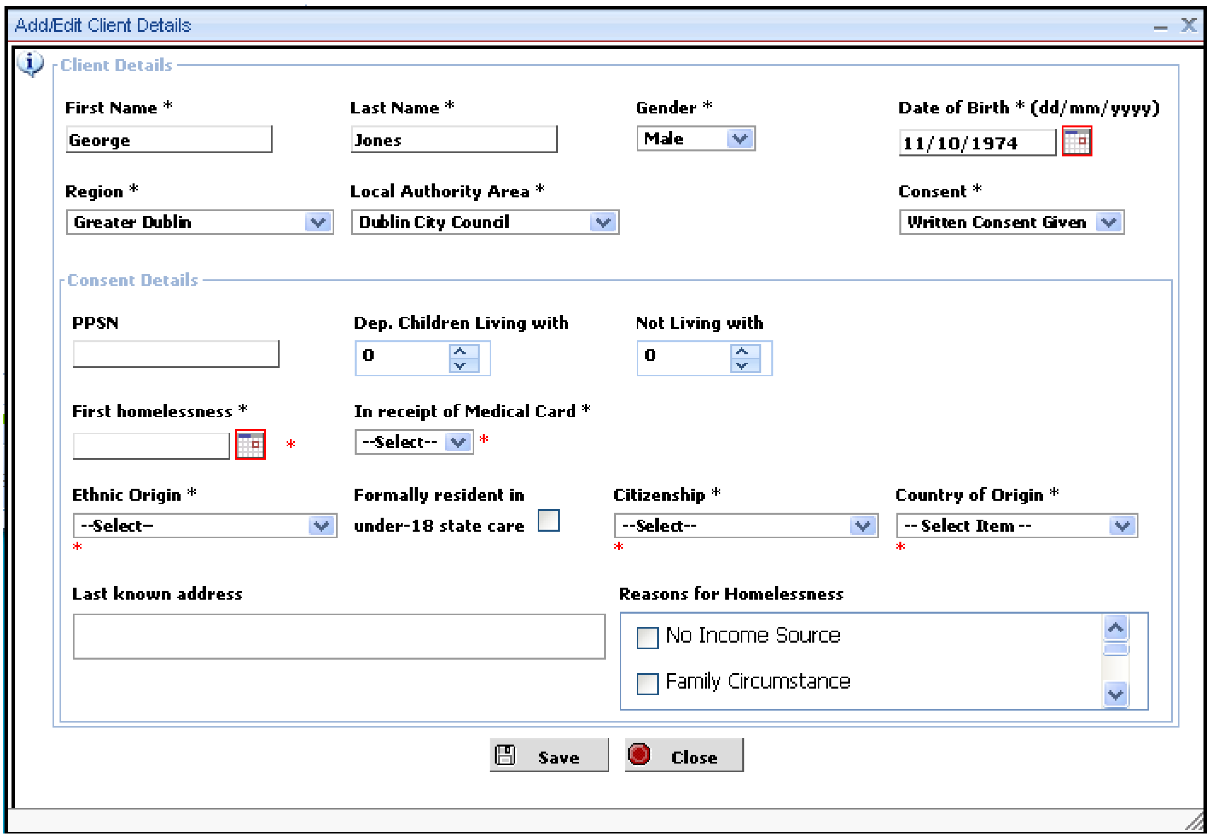
NOTES

5.4. Adding a Client (Consent Given)

In order to add a client to PASS that has given consent, the steps involved are identical to those outlined above, however you then select any of the following values from the consent dropdown:

- "Written Consent Given"
- "Verbal Consent Given"

Once you select one of these values, you will be presented with a screen as shown below:



As shown above, in addition to the minimal dataset, the following fields are shown:

Field	Field Type	Description
PPSN	Text (not mandatory)	This is the client's PPSN. Note that this field is only available to staff of Local Authority Services
Dep. Children Living With	Numeric (mandatory)	The number of children living with the client
Not Living With	Numeric (mandatory)	The number of the client's children not living with the client

First Homelessness	Date (mandatory)	The date the client first experienced homelessness
In receipt of medical card	Dropdown (mandatory)	Whether the client has a medical card
Ethnic Origin	Dropdown (mandatory)	The client's ethnic origin
Formally resident in unde-18 state care	Checkbox (mandatory)	Whether or not the client is Formally resident in unde-18 state care
Citizenship	Dropdown (mandatory)	The client's citizenship
Country of Origin	Dropdown (mandatory)	The client's country of origin
Last known address	Text (not mandatory)	The client's last know address
Reasons for homelessness	Multi-select List (not mandatory)	A list of one or more reasons as to why the client is currently experiencing homelessness

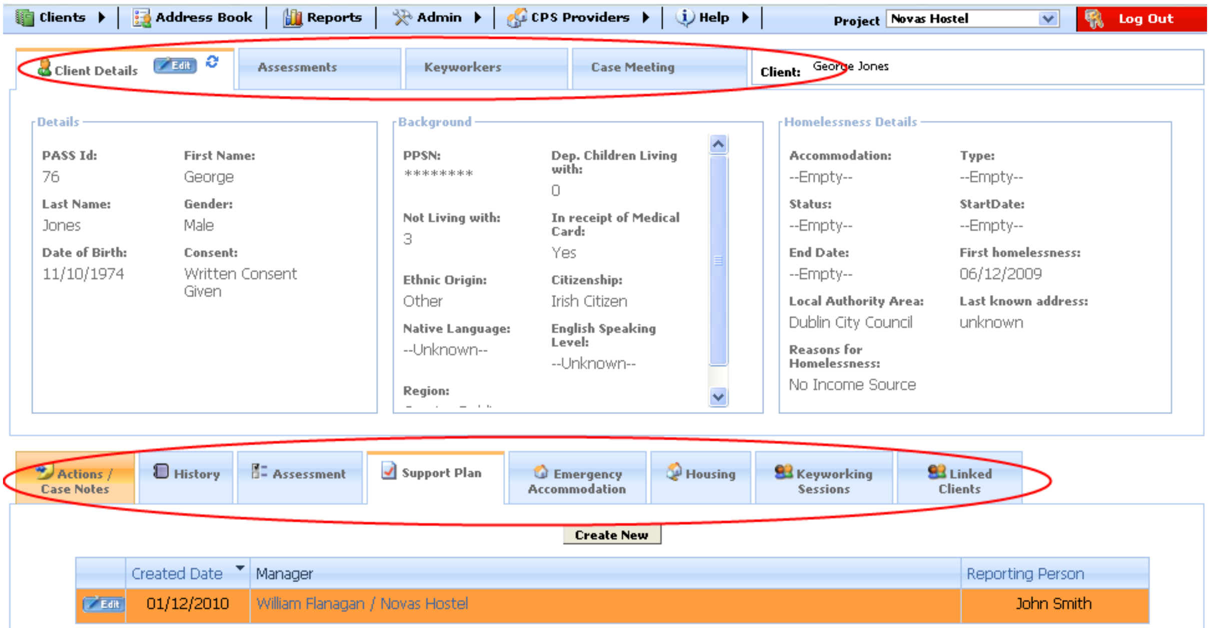
5.4.1. Exercise

Follow the previous exercise, but this time record the client's consent to having their details recorded on PASS.

NOTES

5.5. Client Screen Navigation (Consent Given)

A key feature on the PASS is that it provides the user with the ability to view all detail relating to a single client without the need to leave the client screen itself. This is achieved via a series of tabs on the upper and lower levels of the screen, as shown below:



When viewing the client screen for a client that has given consent, notice that the upper half of the Client Screen contains the following elements:

Section	Description
Client Details	The client details are contained in the upper half of the screen and are displayed by activating this tab. The client details dataset is broken in to three panels, and contains • Details (i.e. the minimum dataset details) • Background • Homelessness Details Note that there is an Edit icon at the top of this tab which opens up the edit screen for the client details as discussed previously. This can be used to toggle consent for the client.
Assessments	The Assessments tab contains detail on the various types of assessment carried out on the client, and includes the following: • Initial On-Street Assessment • Assessment of Housing needs

	• Holistic Needs Assessment (HNA) details
Keyworkers	This tab contains a list of all project workers who have assumed the role of Key Worker or Case Manager for the client
Case Meetings	A list of all Case Meetings for the client

If you are not a free-phone operator role, you will also have access to the set of panels on the bottom half of the screen. These include the following sections:

Section	Description
Actions / Case Notes	Allows the keyworker to manage all actions / case notes against this client
History	A detailed history of all actions carried out against this client
Support Plan	The details of the client's support plan(s), including support plan needs, actions, reviews. Permissions (i.e. Access Rights) to the support plan are managed by the support plan owner and/or their project manager
Emergency Accommodation	Allows the user to manage the client's admission to Emergency Accommodation, as well as viewing a full history of the client's access to emergency accommodation
Housing	Allows the user to manage the creation of new tenancies for the client, as well as viewing a full history of the client's previous tenancies
Keyworking Sessions	Allows keyworkers to record the details of their keyworking sessions with the client
Linked Clients	This tab allows for clients to be linked to other clients that are within PASS, and for the relationship between the two clients to be recorded

5.5.1. Exercise

Following on from the previous exercise (where you saved a client with consent recorded), browser around all of the available tabs and panels on the client management screen in order to become more familiar with the client management screen.

NOTES

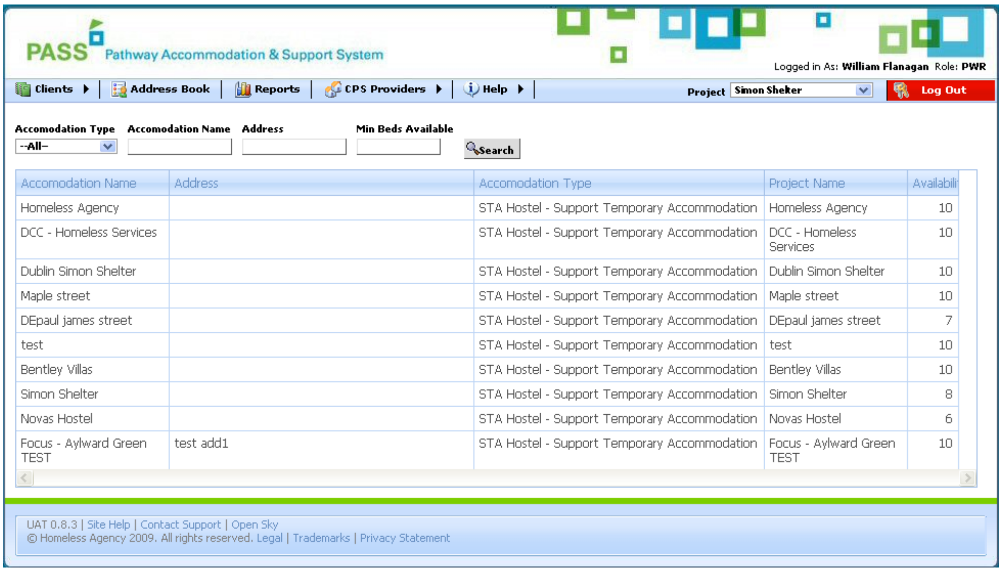
6. CENTRALISED PLACEMENT SERVICE (CAPEL STREET)

PASS provides for full management of the Centralised Placement Service (CPS), which caters for the placement of clients in Emergency Accommodation. In the majority of cases, this forms most clients' first representation to the Pathway model.

Typically, a client's access to Emergency Accommodation will be recorded by a Local Authority worker or the Freephone Operator, however Emergency Accommodation providers can also record the admission of a client directly to their accommodation.

6.1. Manage CPS Providers

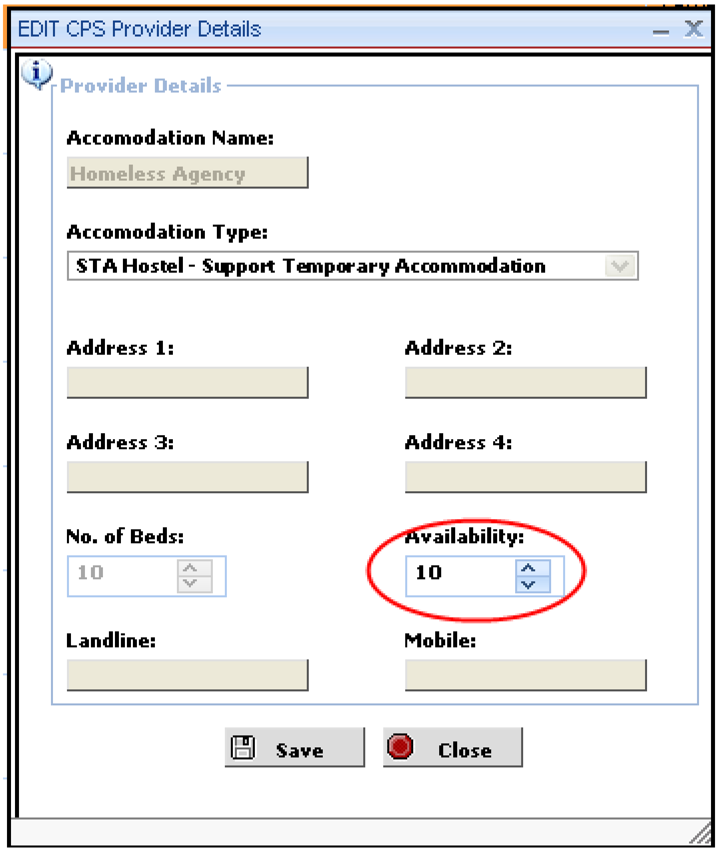
By clicking on the "CPS Providers" link on the top navigation bar, users will have the ability to view all CPS Providers and see what is the current availability of Emergency Accommodation for each one.



Accomodation Name	Address	Accomodation Type	Project Name	Availabili
Homeless Agency		STA Hostel - Support Temporary Accommodation	Homeless Agency	10
DCC - Homeless Services		STA Hostel - Support Temporary Accommodation	DCC - Homeless Services	10
Dublin Simon Shelter		STA Hostel - Support Temporary Accommodation	Dublin Simon Shelter	10
Maple street		STA Hostel - Support Temporary Accommodation	Maple street	10
DEpaul james street		STA Hostel - Support Temporary Accommodation	DEpaul james street	7
test		STA Hostel - Support Temporary Accommodation	test	10
Bentley Villas		STA Hostel - Support Temporary Accommodation	Bentley Villas	10
Simon Shelter		STA Hostel - Support Temporary Accommodation	Simon Shelter	8
Novas Hostel		STA Hostel - Support Temporary Accommodation	Novas Hostel	6
Focus - Aylward Green TEST	test add1	STA Hostel - Support Temporary Accommodation	Focus - Aylward Green TEST	10

***Note:** As details of clients' admissions to Emergency Accommodation is recorded on the system, PASS automatically updates the overall availability of the CPS Providers in real time.*

If you are a Freephone User, you will also have the ability to manually update the "Availability" for each CPS provider. In this case, there will be a Edit icon next to the CPS Provider. Clicking this button brings up the following pop-up which allows you to modify the current availability:



(Note that all other fields in the above dialog are read-only).

Note: *Typically the Freephone user would only manually update a provider's availability once a day, e.g. in the morning following a ring around of the providers.*

Alternatively, the Provider may contact Capel Street directly to inform them of a change in availability, which can typically happen when beds are out of commission due to maintenance (this is a regular occurrence).

6.1.1. Exercise

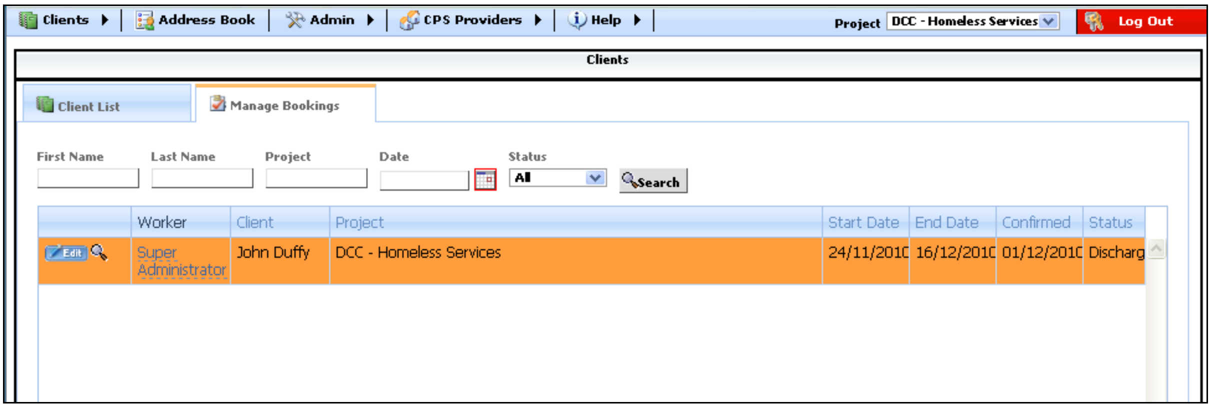
Open the CPS Provider panel and search for available emergency accommodation. If you are a Freephone Operator, edit the availability for one of these CPS Providers.

NOTES

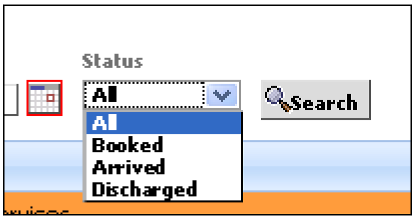
6.2. Manage CPS Bookings (Freephone/Local Authority)

Freephone and Local Authority users have responsibility for maintaining bookings into the CPS.

When the Freephone user logs in, their default view is the current "Manage Bookings" view. This shows the Freephone operator a full view of the outstanding bookings currently on the CPS and of any recent dis-charges.



The following search criteria is available to filter the bookings:



6.2.1. Exercise

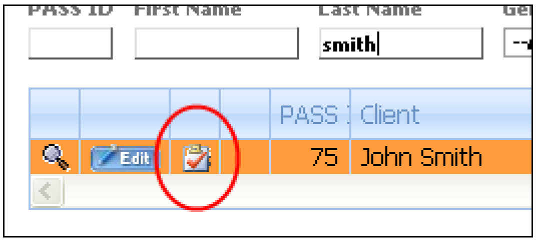
If you have the FPO/LAO role, go to the "Manage Bookings" tab and search for CPS bookings.

NOTES

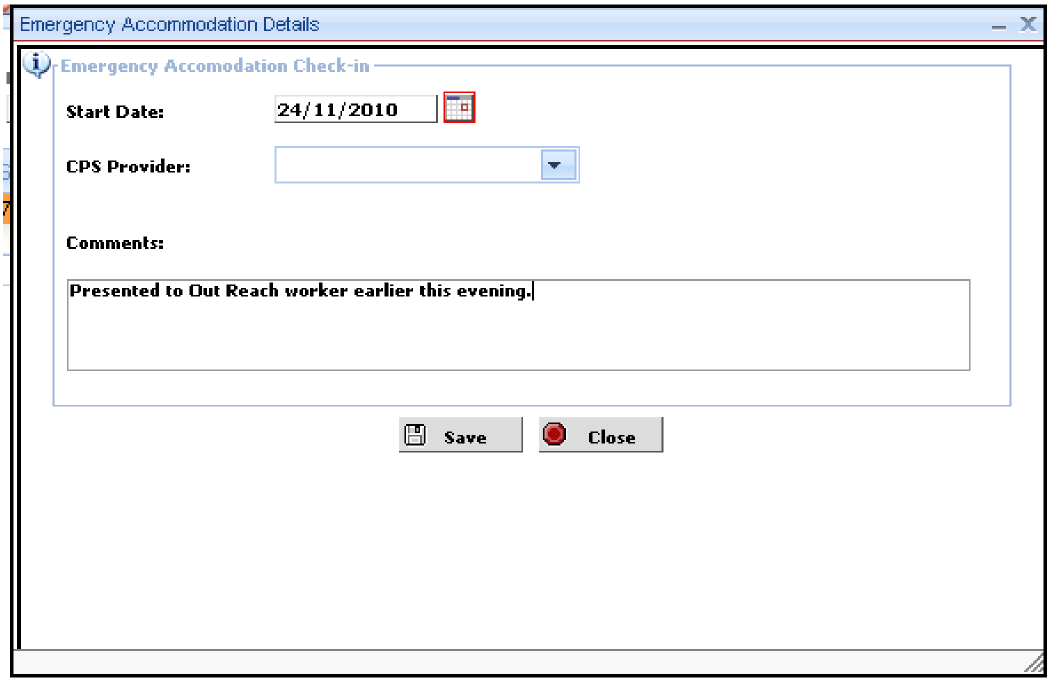
6.3. Make CPS Booking via Client Screen (FPO/LAO)

When the FPO or LAO wishes to record a new booking on the CPS, they should first search for the client on PASS, and if the client does not exist, create the client as described earlier.

The FPO/LAO can create a booking from the client search screen. As described earlier, clients can be filtered using search criteria. The resultant search grid that is presented to the FPO/LAO users displays a "**Make Booking**" icon, as shown below:

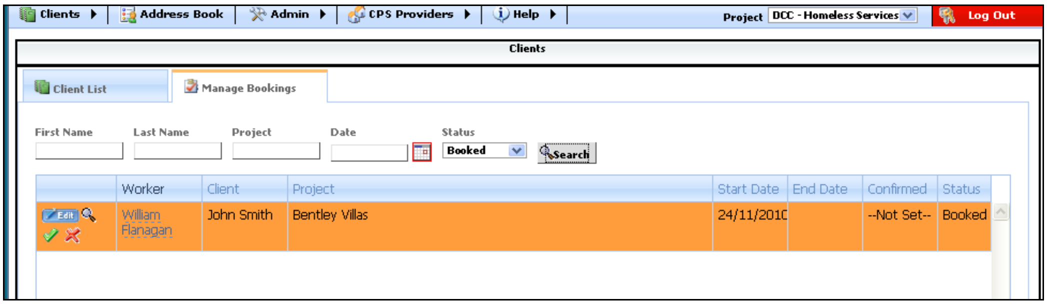


Clicking on this icon displays the following dialog:



On this screen, the FPO/LAO can select the date that the client is to be checked in, the CPS Provider, and can record any notes against this booking as is deemed appropriate.

Once the booking is made, it will appear on the FPO/LAO's "Manage Bookings" tab as an active booking, as shown below:



6.3.1. Exercise

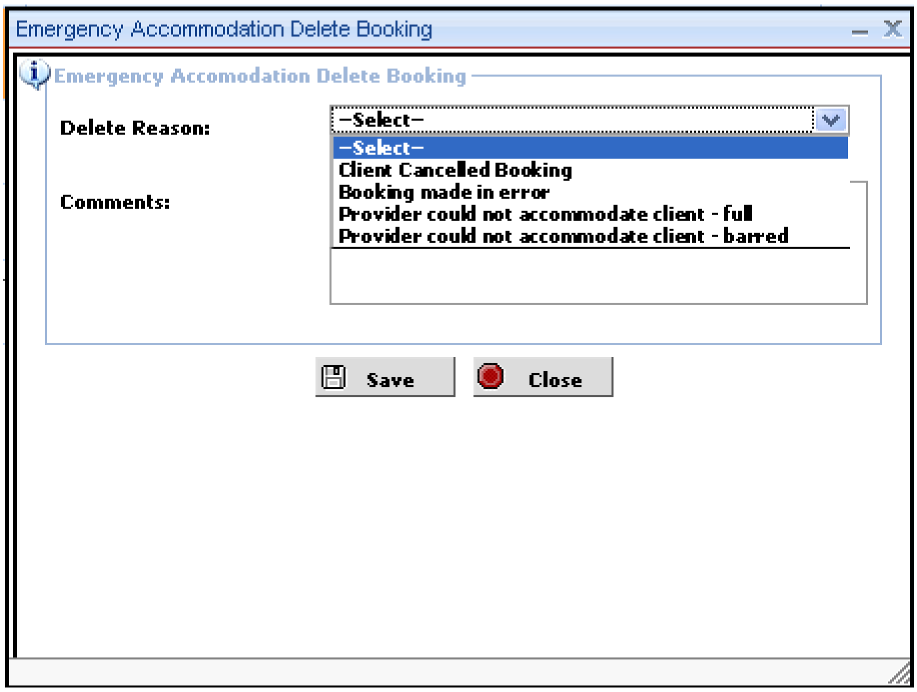
Do this exercise if you are an FPO/LAO user. For the client that you created in one of the earlier exercises, create a CPS Booking for that client from the client search panel.

NOTES

6.4. Cancelling a Booking (FPO/LAO)

The FPO/LAO can cancel a booking that was recorded in error on PASS. To do this, the user should click the icon on the "Manage Bookings" grid next to the booking that they wish to delete. The user will be prompted whether they wish to proceed with this delete.

If the user confirms that they wish to proceed with this deletion, they will be prompted with a dialog which will request a delete reason and a comment, as shown below:



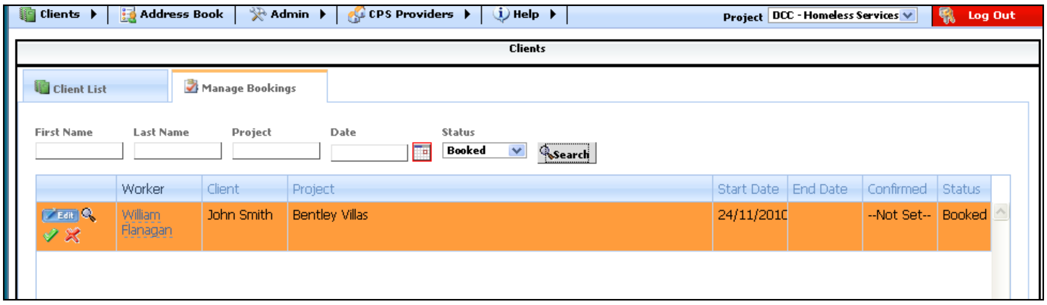
6.4.1. Exercise

Do this exercise if you are an FPO/LAO user. Create a booking for a client, and then delete this booking, recording a reason and a comment for same.

NOTES

6.5. Confirming a Booking (by the Accommodation Provider)

It is crucial that the Accommodation Providers confirm the arrival of clients at their emergency accommodation. To do this, the Project Worker for the emergency accommodation should log in to PASS and then view their Manage Bookings tab on the Client Search screen, as shown below:



Click the icon on the "Manage Bookings" grid next to the client whose arrival they wish to confirm. The user will be prompted whether they wish to proceed with this confirmation.

> ***Note:** It is of **crucial importance** that the service providers use PASS to confirm the clients' arrivals, so that PASS can keep a proper tally of the numbers of available beds.*

Once this is done, the dialog icons next to the booking change as follows:

The new icon (circled above) will allow the user to record the discharging of the client from the Emergency Accommodation (this is described in a later section).

6.5.1. Exercise

Do this exercise if you are an FPO/LAO user. For the booking that you created in one of the previous exercise, confirm the client's arrival at the CPS Emergency Accommodation.

NOTES

6.6. Confirming a Booking (FPO/LAO)

Alternative to the previous scenario, it is possible for the FPO/LAO to record a confirmation of the client's arrival at the Emergency Accommodation on PASS. To do this, the user should click the icon on the "Manage Bookings" grid next to the booking that they wish to confirm. The user will be prompted whether they wish to proceed with this confirmation.

Once this is done, the dialog icons next to the booking change as follows:

The new icon (circled above) will allow the FPO/LAO to record the discharging of the client from the Emergency Accommodation (this is described in a later section).

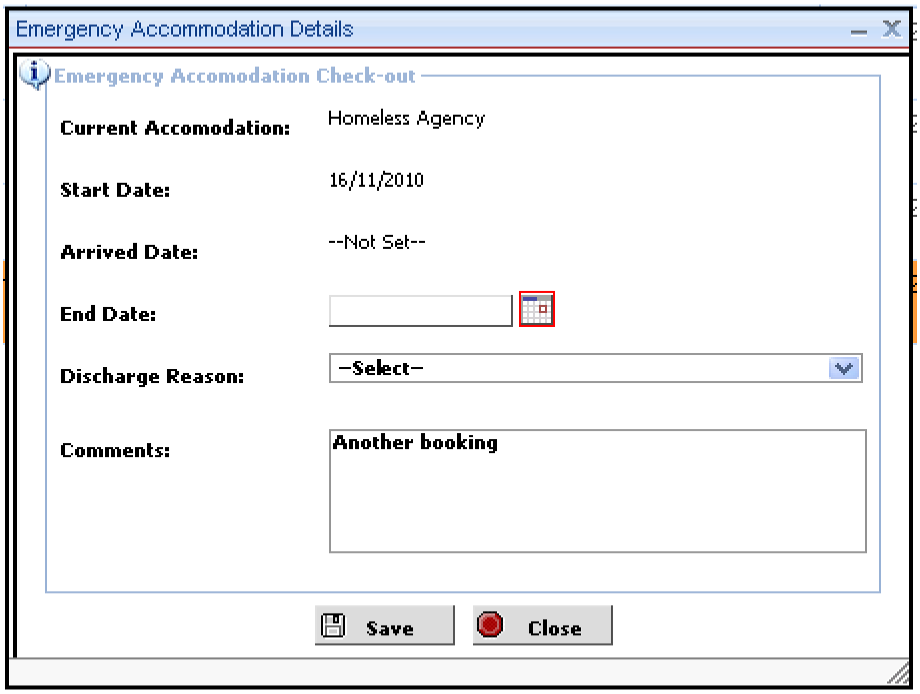
6.6.1. Exercise

For the booking that you created in one of the previous exercise, confirm the client's arrival at the CPS Emergency Accommodation.

NOTES

6.7. Discharging from Emergency Accommodation

Accommodation providers should always record a client's discharge from their booking in Emergency Accommodation on PASS. To do this, the user should click the icon on the "Manage Bookings" grid next to the booking that they wish to discharge. If the client was properly registered at the Emergency Accommodation, the user will be prompted with the following dialog:



The user can set the "End Date" for this period in the CPS Provider's Emergency Accommodation, and must select the discharge reason and append any further comments as required.

6.7.1. Exercise

For the booking that you confirmed in one of the previous exercise, confirm the client's discharge from the CPS Emergency Accommodation.

NOTES

7. CLIENT ASSESSMENTS

There are a number of different Assessments that are recorded as part of the PASS dataset, these include:

- Initial On-Street Assessment
- Assessment of Housing Needs
- Holistic Needs Assessment (discussed in a later section)

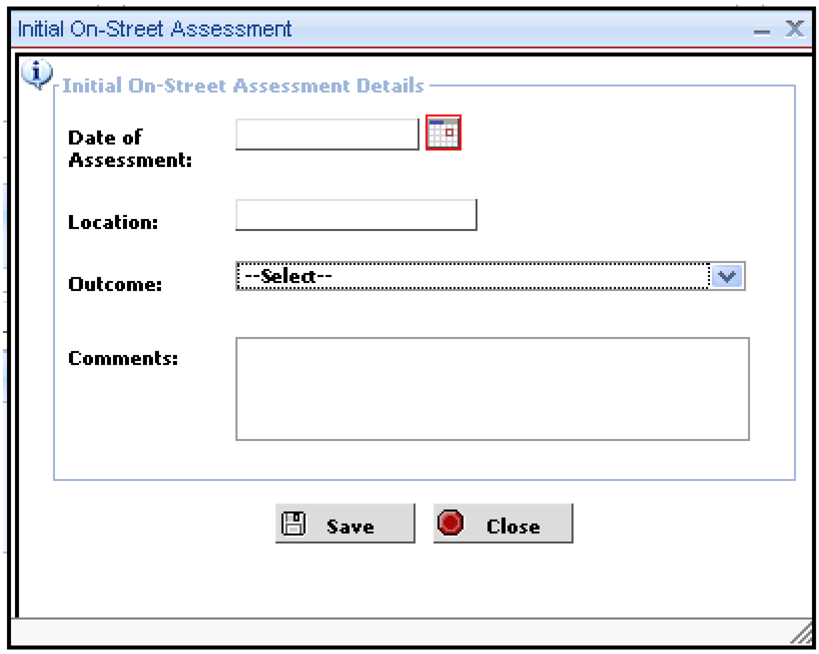
7.1. Initial On-Street Assessment

The Initial On-Street Assessment will primarily be recorded by the Unitary Outreach service, but can also be recorded by Project Workers or Free-phone/Local Authority users.

In order to record this Assessment for the client, you must first search for (or create) the client on PASS, and then navigate to the "Assessment" tab on the upper part of the client page.

Next to the "Initial On-Street Assessment" group box, click the 

icon which will pop-up the following dialog:



***Note:** Client Consent must first have been recorded for this before this Assessment can be accessed.*

*Note also that **subsequent** contact with the client after the Initial On-Street Assessment will be recorded via the "Actions/Case Notes" section of the client screen (discussed in a later section).*

The Initial On-Street Assessment dataset is described as follows:

Field	Field Type	Description
Date of Assessment	Date (mandatory)	The date that the assessment was carried out
Location	Text (mandatory)	The location where the assessment was carried out.
Outcome	Dropdown (mandatory)	A list of possible outcomes of the assessment, possible values may include: • Referred to Temporary Emergency Accommodation • Referred to Support Temporary Accommodation • Refused to accept accommodation place • Referred to health team • No referral required • Insufficient emergency accommodation • Referred to Rough Sleeper Team • No outcome for client
Comments	Text (not mandatory)	Any comments that the user wishes to add

7.1.1. Exercise

For one of the clients created in a previous exercise, add an Initial On-Street Assessment.

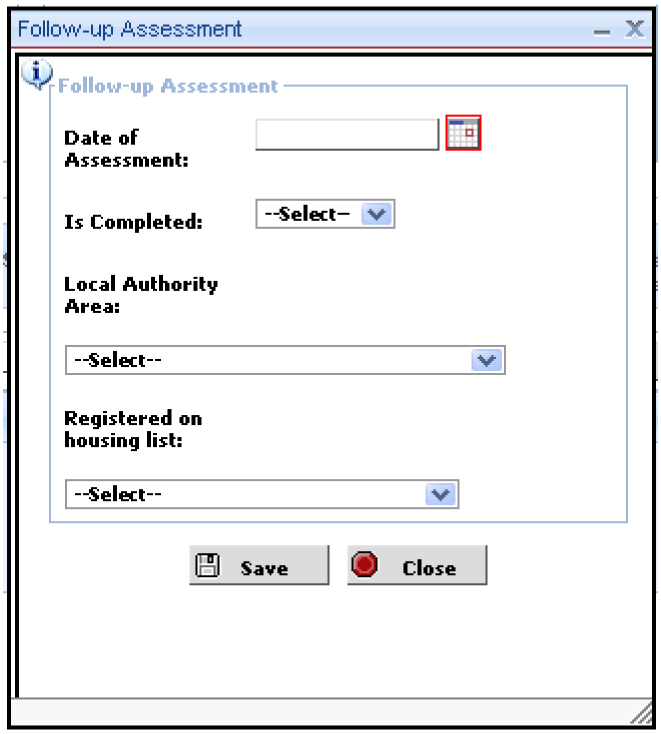
NOTES

7.2. Assessment of Housing Need

The Assessment of Housing Need (also know as the Local Authority Housing Needs Assessment) will be entered by the Local Authority user. The reason for recording this information on PASS is so that other Local Authorities and Voluntary bodies working on behalf of the client can quickly determine the client's status on the housing list.

In order to record this Assessment for the client, you must first search for (or create) the client on PASS, and then navigate to the "Assessment" tab on the upper part of the client page.

Next to the "Assessment of Housing Need" group box, click the icon which will pop-up the following dialog:



Note: *Client Consent must first have been recorded for this before this Assessment can be accessed.*

The Assessment of Housing Need dataset is described as follows:

Field	Field Type	Description
Date of Assessment	Date (mandatory)	The date that the assessment was carried out
Is Completed	Yes/No (mandatory)	Has the assessment been completed

Local Authority Area	Dropdown (mandatory)	The Local Authority on behalf of whom the assessment was carried out.
Registered on housing list	Dropdown (mandatory)	The status of the client's registration on the Local Authority's housing list. Possible values include: • Accepted with Homeless Priority • Accepted without Homeless Priority • Rejected • Processing

7.2.1. Exercise

For one of the clients created in a previous exercise, add an Assessment of Housing Need.

NOTES

8. Holistic Needs Assessment (HNA)

The Holistic Needs Assessment (HNA) is entered by a project worker/manager. Due to the extremely sensitive nature of the HNA data, the user will only record the fact that HNA Domains have been completed for a client. This will allow other system users to see which domains have been completed, by whom, and where the HNA physically resides. As the HNA is a once-off document (un-like the Support Plan which will evolve with the client), it is not recorded on PASS.

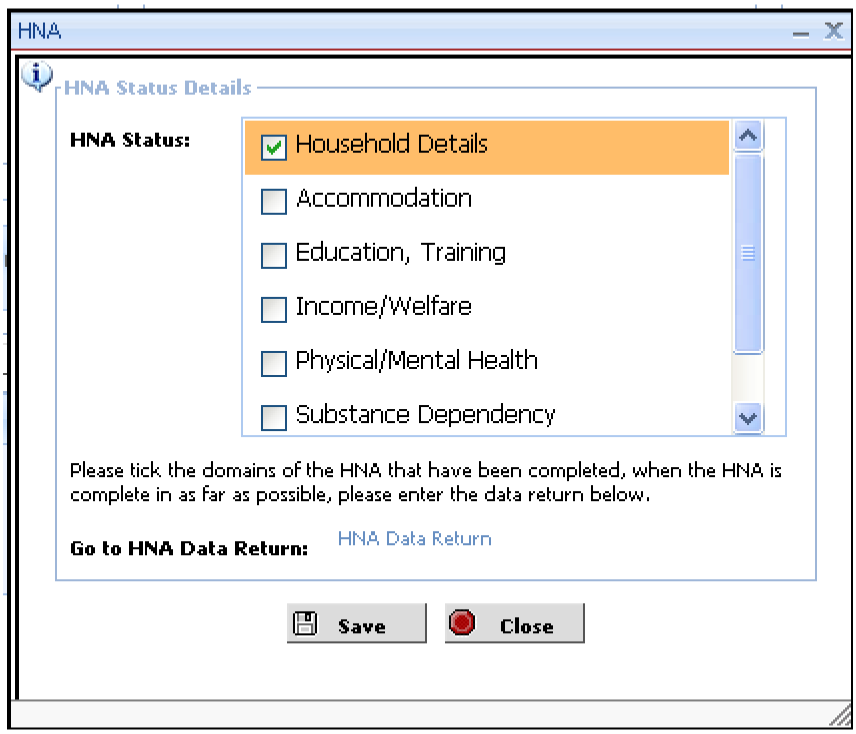
The user will also fill in a HNA Data Return, which is an anonymised report of a subset of the HNA data, which is purely used for reporting purposes, and cannot be traced back to the client. This replaces the paper based version of the HNA Data Return.

8.1. Recording HNA Status

In order to record this Assessment for the client, you must first search for (or create) the client on PASS, and then navigate to the "Assessment" tab on the upper part of the client page.

Next to the "HNA" group box, click the 

icon which will pop-up the following dialog:



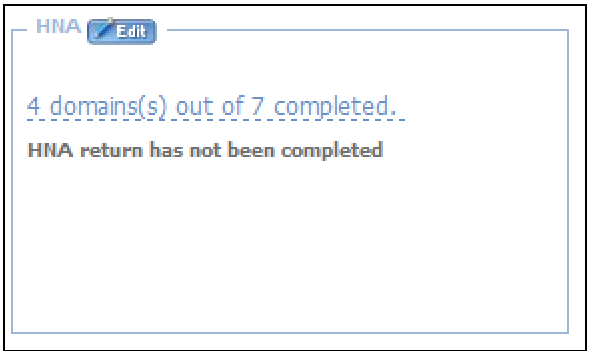
Note: *Client Consent must first have been recorded for this before this Assessment can be accessed.*

Note also that the HNA Status can only be updated prior to the upload of the HNA Data Return. Once the HNA Data Return has been completed, the HNA Status can no longer be modified.

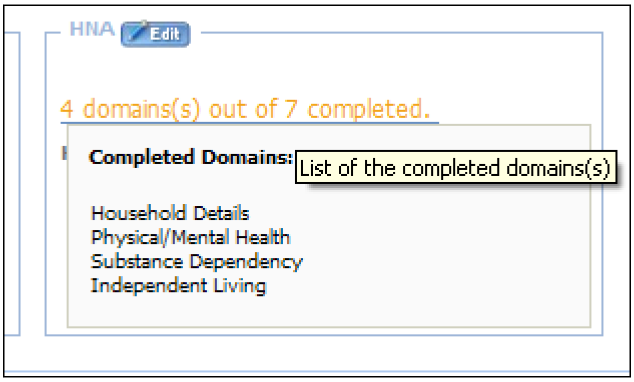
As shown above, the HNA status is broken down in to a series of domains, and the user should record the domains that have been completed in the above dialog.

Field	Field Type	Description
HNA Status	Multi-select (not mandatory)	The HNA status is broken down in to a series of domains, possible values for this field include: • Household Details • Accommodation • Education, Training • Income/Welfare • Physical/Mental Health • Substance Dependency • Independent Living

As the HNA Status is modified, you will notice that on the Client panel, the HNA Details will be updated, as shown in the following:



If you hover the mouse over the status, you will be given more detail on the HNA Status, as shown below:



8.1.1. Exercise

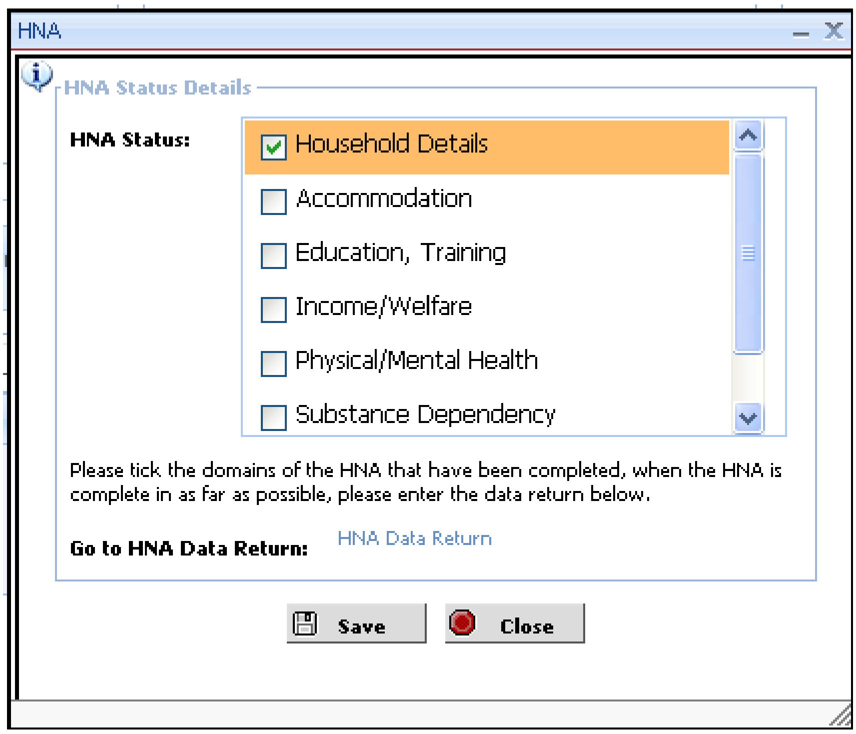
For one of the clients created in a previous exercise, edit the HNA Status for the client by updating some of the completed domains. Notice that the status updates on the client panel.

NOTES

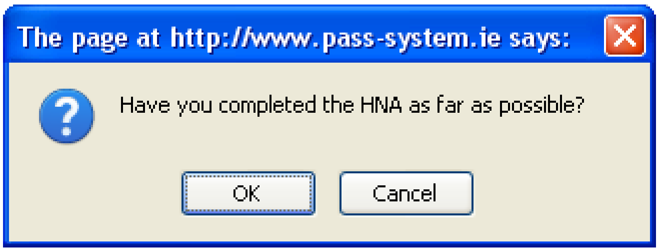
8.2. HNA Data Return

Next to the "HNA" group box, click the 

icon which will pop-up the following dialog:

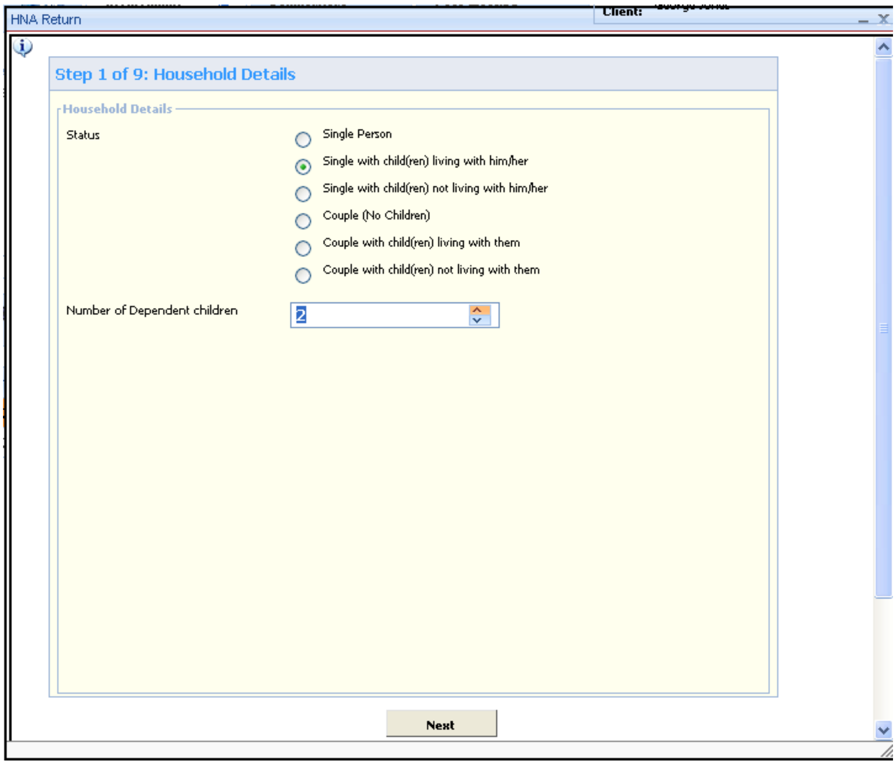


Click on the "HNA Data Return" hyperlink on this dialog to open the HNA Data Return questionnaire. You will be prompted with the following alert before being allowed to continue:



Note: *the HNA data return can only be completed once for a client. Thereafter, both it and the HNA Status Details are locked down.*

The HNA Data Return screens will present a series of dialogs which should be completed as thoroughly as possible by the user. An example of the first questionnaire screen is shown below:



Clicking the next button moves you along to through the questionnaire wizard, until the finish button is presented on the final page of the wizard.

Note: *the HNA data return is a direct copy of the previous paper based version 2 of the Holistic Needs Assessment Data Return.*

8.2.1. Exercise

For one of the clients created in a previous exercise, fill in the HNA Data Return for the client.

NOTES

9. Client Keyworkers/Case Managers

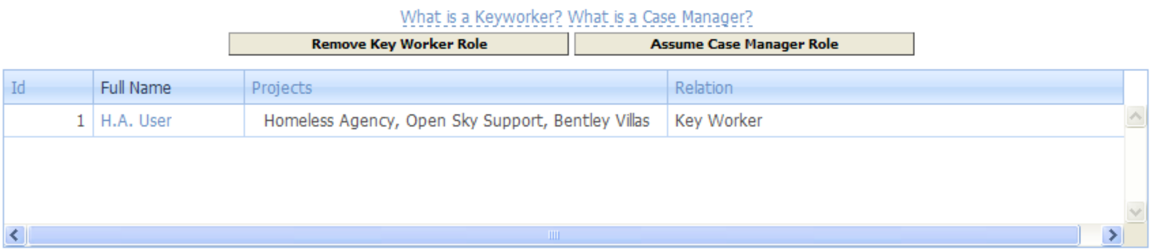
Based on the Holistic Needs Assessment, the key worker works with the service user to achieve the support plan goals identified and ensures implementation of the goals. Case Manager:

The Case Manager is a lead Key Worker that co-ordinates services involved in the HNA Support Plan, oversees its implementation, undertakes reviews and will generally have most contact with service user. The role of case manager can be taken on by a key worker/ project worker by elevating the level of intensity of engagement with the service user and other service providers. There are a core set of competencies which a case manager should demonstrate. These competencies can be developed through a targeted training programme.

9.1. Viewing Existing Keyworkers

In order to view the existing keyworkers/case managers for the client, you must first search for (or create) the client on PASS, and then navigate to the "Keyworkers" tab on the upper part of the client page.

You will be presented with the following dialog which shows all the existing keyworkers and/or case managers for this client, as shown below:



9.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Keyworkers tab and view who (if any) the keyworkers are for the client.

NOTES

9.2. Assume Keyworker/Case Manager Role

If you are satisfied that you wish to take on a case role for this client, you should click on the "Assume Keyworker" or "Assume Case Manager".

Note: *a project worker may assume BOTH the Keyworker and a Case Manager role for a particular client. Note also that as soon as you assume a role, the text on the button changes to allow you to remove that role should you so wish.*

9.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Keyworkers tab and click on the "Assume Keyworker role", and the "Assume Case Manager Role".

NOTES

9.3. Remove Keyworker/Case Manager Role

If you are satisfied that you wish to remove your role for this client, you should click on the "Remove Keyworker" and/or "Remove Case Manager" buttons.

9.3.1. Exercise

For one of the clients created in a previous exercise, browse to the Keyworkers tab and click on the "Assume Keyworker role", and the "Assume Case Manager Role".

NOTES

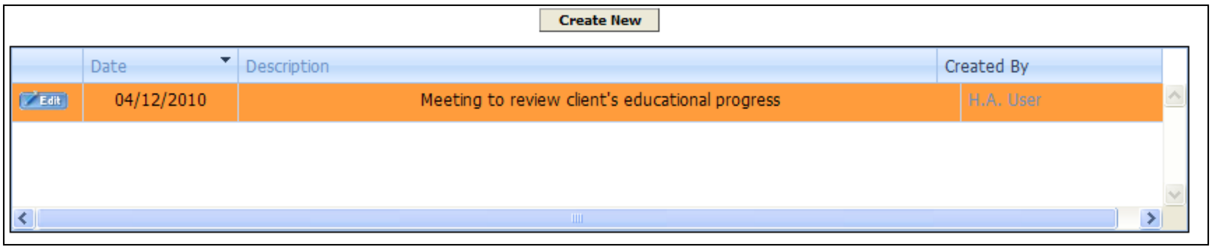
10. CLIENT CASE MEETINGS

Project Workers, Key Workers, Case Managers, etc can participate in Case Meetings that are scheduled via PASS. The worker who creates the case meeting can also invite other participants to the case meeting. Those other participants will then be able to view a reminder on the main page of the system when they log in.

10.1. Viewing Existing Case Meetings

In order to view the existing case meetings for the client, you must first search for (or create) the client on PASS, and then navigate to the "Case Meetings" tab on the upper part of the client page.

You will be presented with the following dialog which shows all the existing case meetings for this client, as shown below:



10.1.1. Exercise

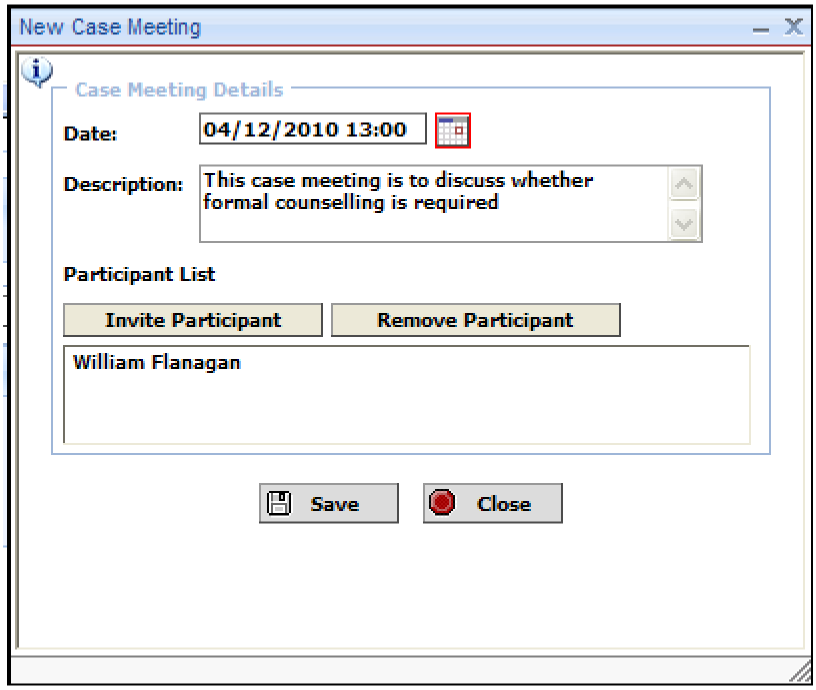
For one of the clients created in a previous exercise, browse to the Case Meeting tab and view if there are any case meetings for the client.

NOTES

10.2. Add/Edit Case Meetings

To add a new case meeting, simply click the "Create New" button on the top of the Case Meeting dialog. Alternatively, you can edit an existing Case Meeting by clicking on the  icon next to the Case Meeting in question.

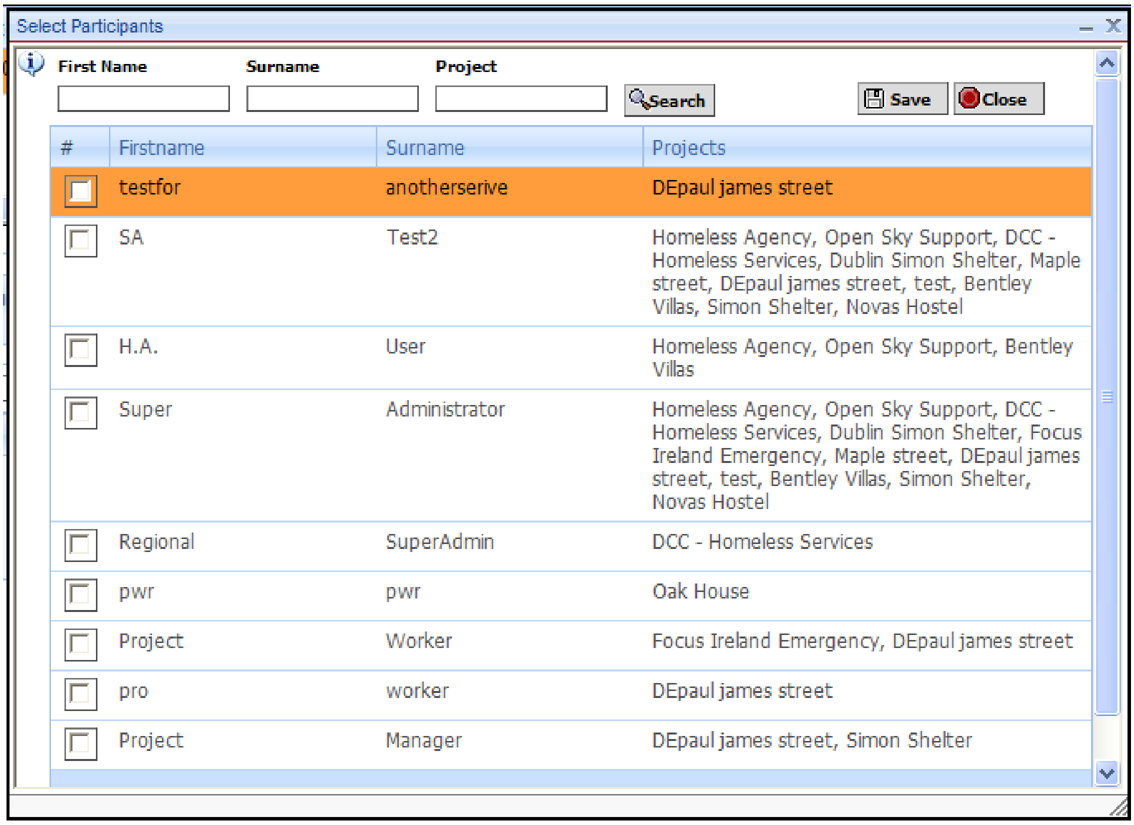
In either case you will be presented with a dialog as follows:



The above dataset is described as follows:

Field	Field Type	Description
Date	Date/time (mandatory)	The date and time that the meeting will take place.
Description	Text (mandatory)	A description of the reason for the meeting.
Participant List	Multi-select (mandatory)	A multi-select list of user id's who are to be the participants on the Case Meeting.

In order to invite a participant to the meeting, you should click the "Invite Participant" button. This will present you with a user search dialog box as follows:



#	Firstname	Surname	Projects
	testfor	anotherserive	DEpaul james street
	SA	Test2	Homeless Agency, Open Sky Support, DCC - Homeless Services, Dublin Simon Shelter, Maple street, DEpaul james street, test, Bentley Villas, Simon Shelter, Novas Hostel
	H.A.	User	Homeless Agency, Open Sky Support, Bentley Villas
	Super	Administrator	Homeless Agency, Open Sky Support, DCC - Homeless Services, Dublin Simon Shelter, Focus Ireland Emergency, Maple street, DEpaul james street, test, Bentley Villas, Simon Shelter, Novas Hostel
	Regional	SuperAdmin	DCC - Homeless Services
	pwr	pwr	Oak House
	Project	Worker	Focus Ireland Emergency, DEpaul james street
	pro	worker	DEpaul james street
	Project	Manager	DEpaul james street, Simon Shelter

Either by using the search criteria or simply by scrolling through the list of users, check the users that you wish to add to the meeting and then click save.

10.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Case Meeting tab and create a new case meeting for the client. Invite participants and save the meeting.

NOTES

11. ACTIONS/CASE NOTES

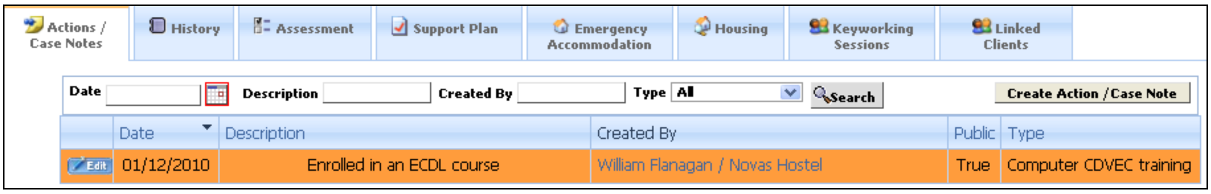
Project Workers can record actions and case notes for a client. These actions/case notes can cover a variety of different areas, and can be made visible to all keyworkers across all projects, or can be restricted to users within your own project.

For example, the Unitary Out-Reach Team will record a "Contact with Rough Sleeper" action when working with a client on-street (i.e. subsequent to the Initial On-Street Assessment). Alternatively, when a client accesses a Training/Education or Employment Programme, this action can be recorded on PASS.

11.1. Viewing Existing Actions/Case Notes

In order to view the existing Actions/Case Notes for the client, you must first search for (or create) the client on PASS, and then navigate to the "Actions/Case Notes" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing Actions/Case Notes for this client, as shown below:



Note that a set of filter criteria is provided so as to enable you to find specific case notes that match the criteria.

11.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Actions/Case Notes tab and view if there are any Actions/Case Notes for the client. Use the search criteria to filter any case notes that may exist.

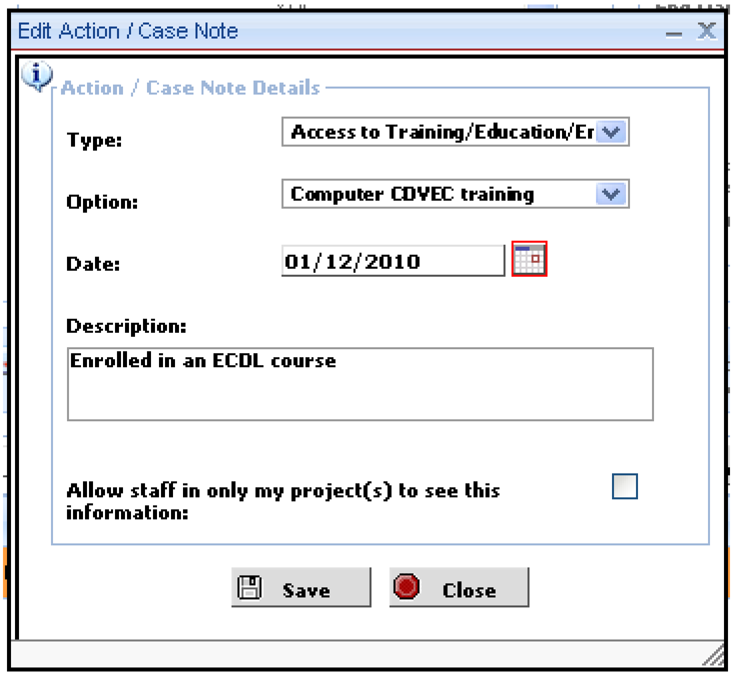
NOTES

11.2. Add or Edit Actions/Case Notes

To add a new Action/Case Note, simply click the "Create Action/Case Note" button on the top right of the Action/Case Note dialog. Alternatively, you can edit an existing Action/Case Note by clicking on the 

icon next to the Action/Case Note in question.

In either case you will be presented with a dialog as follows:



The above dataset is described as follows:

Field	Field Type	Description
Type	Dropdown (mandatory)	The Action/Case Note type is the overall category that applies to this record, possible values include: • Advocacy/Advice • Outreach/In-Reach
Options	Dropdown (mandatory)	The options field is akin to a sub-category of the Type field, and the values displayed herein are dependent on the current Type selected
Date	Date (mandatory)	The date of the Action / Case Note
Description	Text (not mandatory)	A description of the record entered by the user.
Allow staff in only my project(s) to see this	Checkbox	If checked, only users within the same project as the user who recorded the Action/Case Note will be able to see the note.

information:

11.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Actions/Case Notes tab and create a new record for the client. Make the note visible to colleagues in your own project.

NOTES

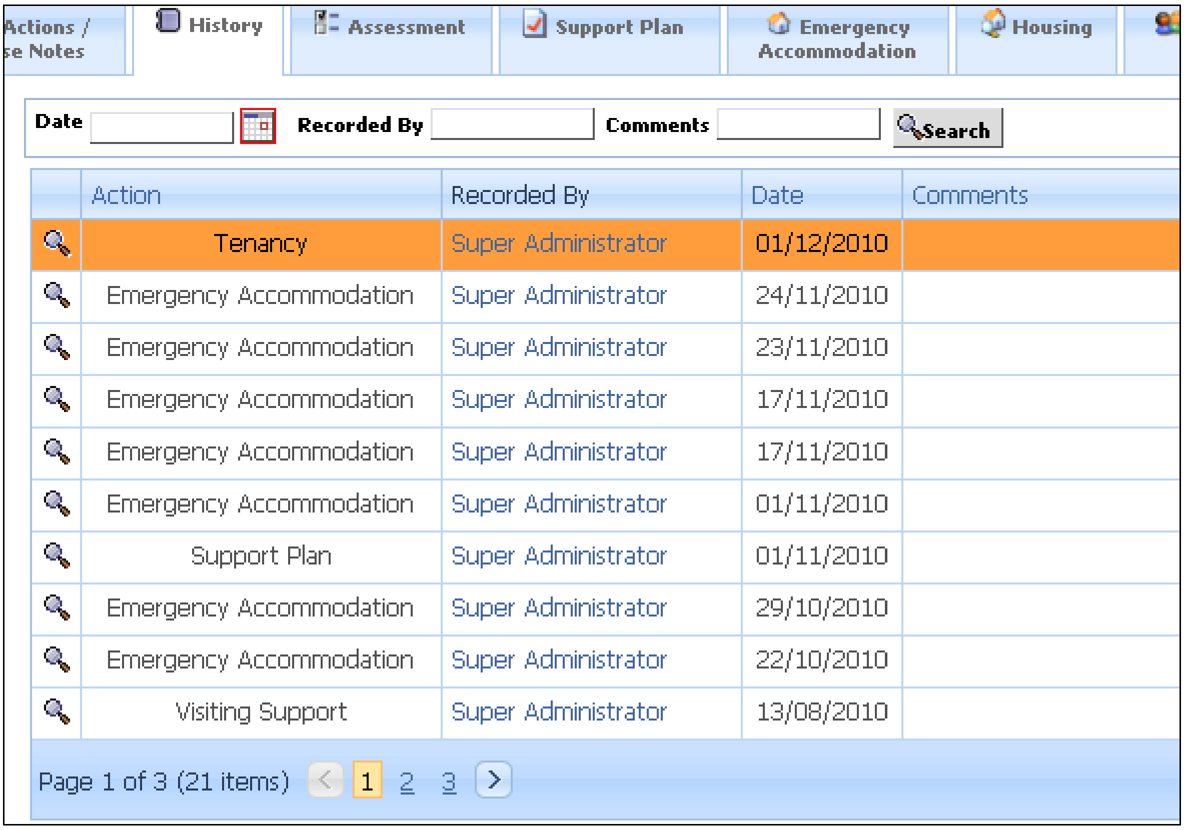
12. CLIENT HISTORY

A full history of all changes to client data is maintained by the system.

12.1. Viewing Client History

In order to view the history for a client, you must first search for (or create) the client on PASS, and then navigate to the "History" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows the full history of all actions on the client, as shown below:



	Action	Recorded By	Date	Comments
	Tenancy	Super Administrator	01/12/2010	
	Emergency Accommodation	Super Administrator	24/11/2010	
	Emergency Accommodation	Super Administrator	23/11/2010	
	Emergency Accommodation	Super Administrator	17/11/2010	
	Emergency Accommodation	Super Administrator	17/11/2010	
	Emergency Accommodation	Super Administrator	01/11/2010	
	Support Plan	Super Administrator	01/11/2010	
	Emergency Accommodation	Super Administrator	29/10/2010	
	Emergency Accommodation	Super Administrator	22/10/2010	
	Visiting Support	Super Administrator	13/08/2010	

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Note that a set of filter criteria is provided so as to enable you to find specific records that match the criteria.

12.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Actions/Case Notes tab and create a new record for the client. Make the note visible to colleagues in your own project.

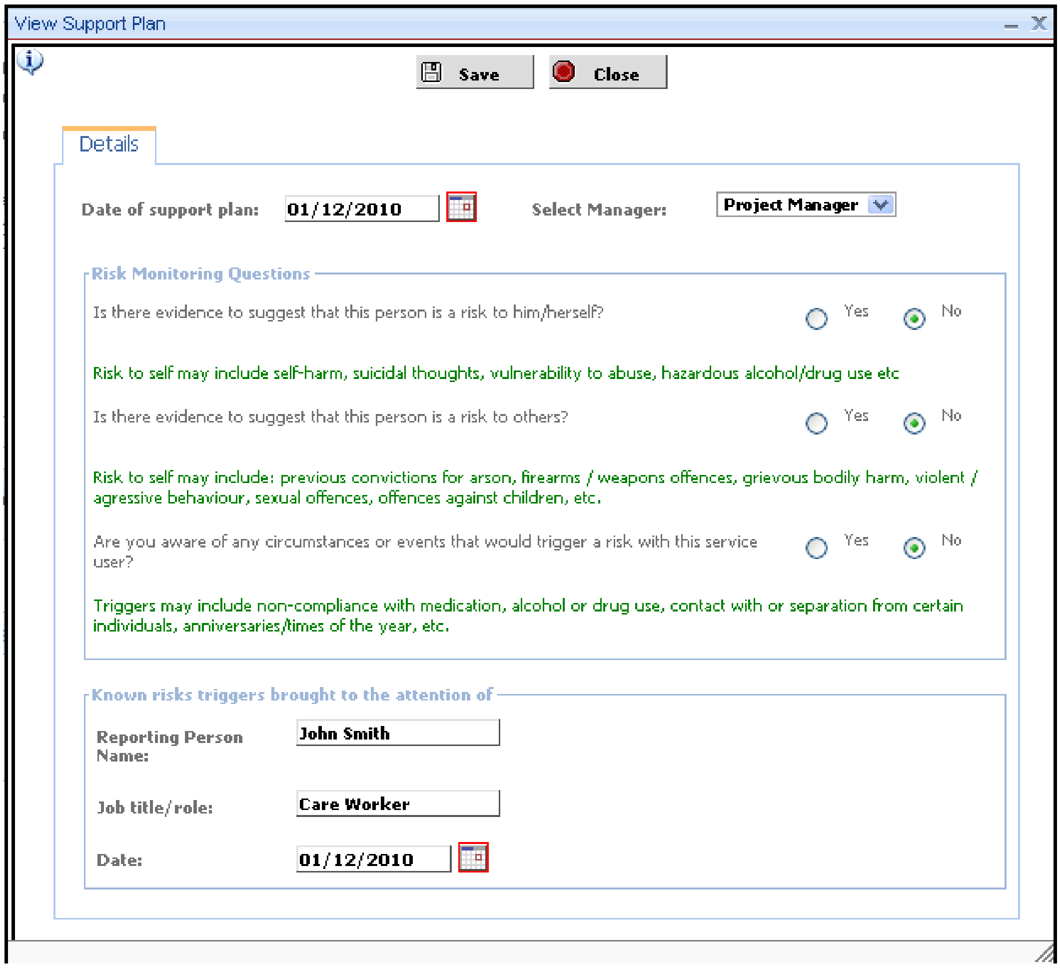
NOTES

13. CLIENT SUPPORT PLAN

The on-line Support Plan will replace the existing paper based support plan. This is a direct copy of version 2 of the paper based support plan.

13.1. Create a Support Plan

To add a new Support Plan, simply click the "Create Support Plan" button on the top right of the Support Plan tab. The following dialog will be displayed:



The above dataset is described as follows:

Field	Field Type	Description
Date of Support Plan	Date (mandatory)	Date of Support Plan
Select Manager	Dropdown (mandatory)	The support plan owner must select one of their project managers to share the support plan ownership rights with.
Risk Monitoring	3 x Radio	A set of questions relating to the client's risk monitoring status

Questions	Buttons(mandatory)	
Reporting Person Name	Text (mandatory)	The name of a person to contact so as to bring to their attention any risks/triggers
Job title/Role	Text (mandatory)	The job title of the reporting person
Date	Date (mandatory)	The date that the reporting person was notified.

The user must first save this information before being allowed to enter the further details on the support plan.

Note: *The user must first save this information before being allowed to enter the further details on the support plan.*

13.1.1. Exercise

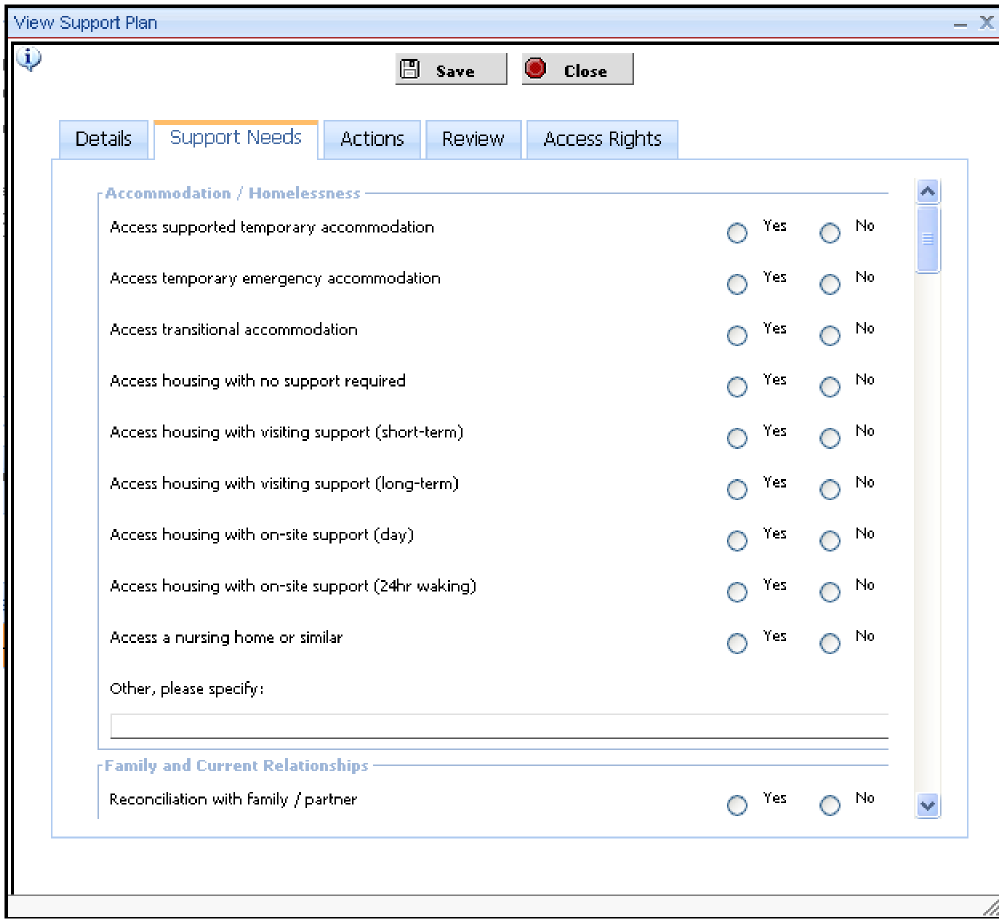
For one of the clients created in a previous exercise, browse to the Support Plan tab and create a new record for the client. Notice that a new set of tabs becomes available **after** you save the support plan.

NOTES

13.2. Manage Support Plan Needs

With the general support plan details saved, the support plan owner can now fill in the support plan needs.

This tab allows the user to identify a set of needs that must be addressed as part of this support plan, as shown below:



The above screen contains a long list of support needs in questionnaire format which the support plan owner has the option to fill out. Note that only the support plan owner will ever have access rights to view the support needs.

13.2.1. Exercise

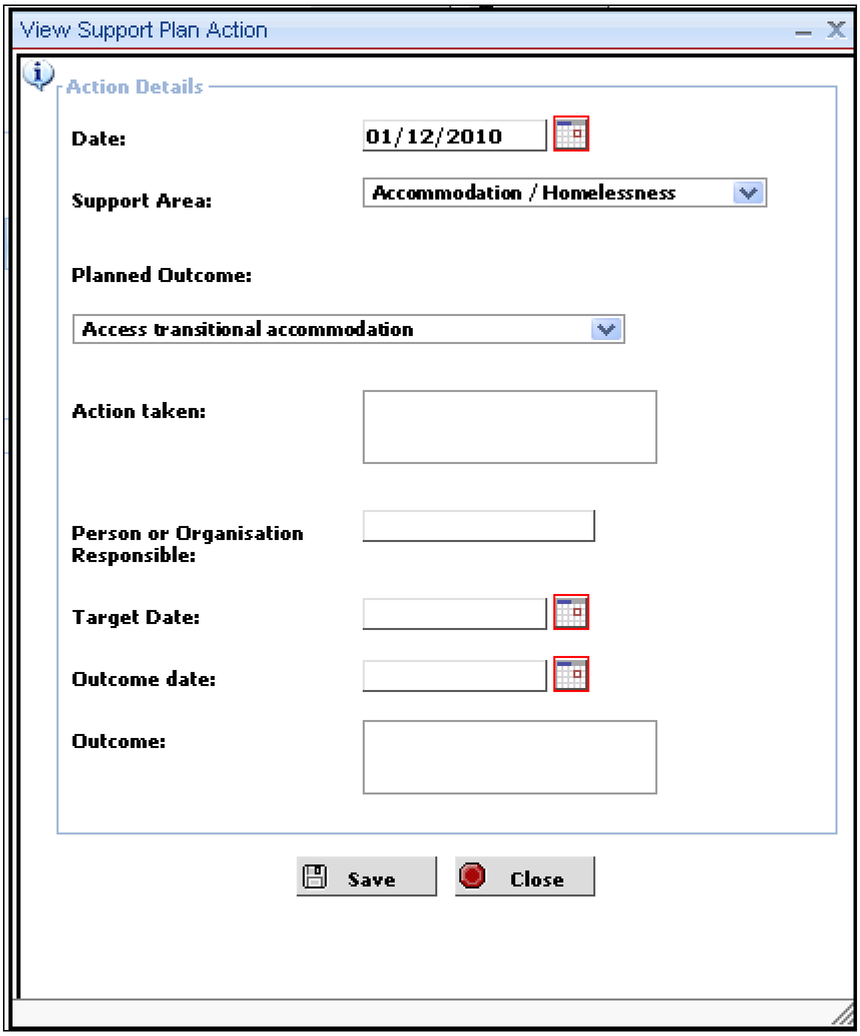
Using the support plan you created in the previous exercise, fill out the support plan needs questionnaire and then proceed to the support plan actions tab.

NOTES

13.3. Manage Support Plan Actions

With the general support plan details saved, the support plan owner can now fill in the support plan actions.

This tab allows the user to identify a set of measurable actions to be taken over the course of the support plan, as shown here:



The above dataset is described as follows:

Field	Field Type	Description
Date	Date (mandatory)	The date the action was recorded
Support Area	Dropdown (mandatory)	The support area (or category) where this action concentrates
Planned Outcome	Dropdown (mandatory)	The outcome planned by the action owner for this action
Action Taken	Text (not mandatory)	A textual description of the steps taken to fulfil this action
Person or Organisation	Text (not mandatory)	The name of a person or organisation that is responsible for

Responsible		this action outside of PASS.
Target Date	Date (mandatory)	The date that the outcome is expected by
Outcome Date	Date (not mandatory)	The date the outcome actually took place
Outcome	Text (not mandatory)	The actual outcome of this action

13.3.1. Exercise

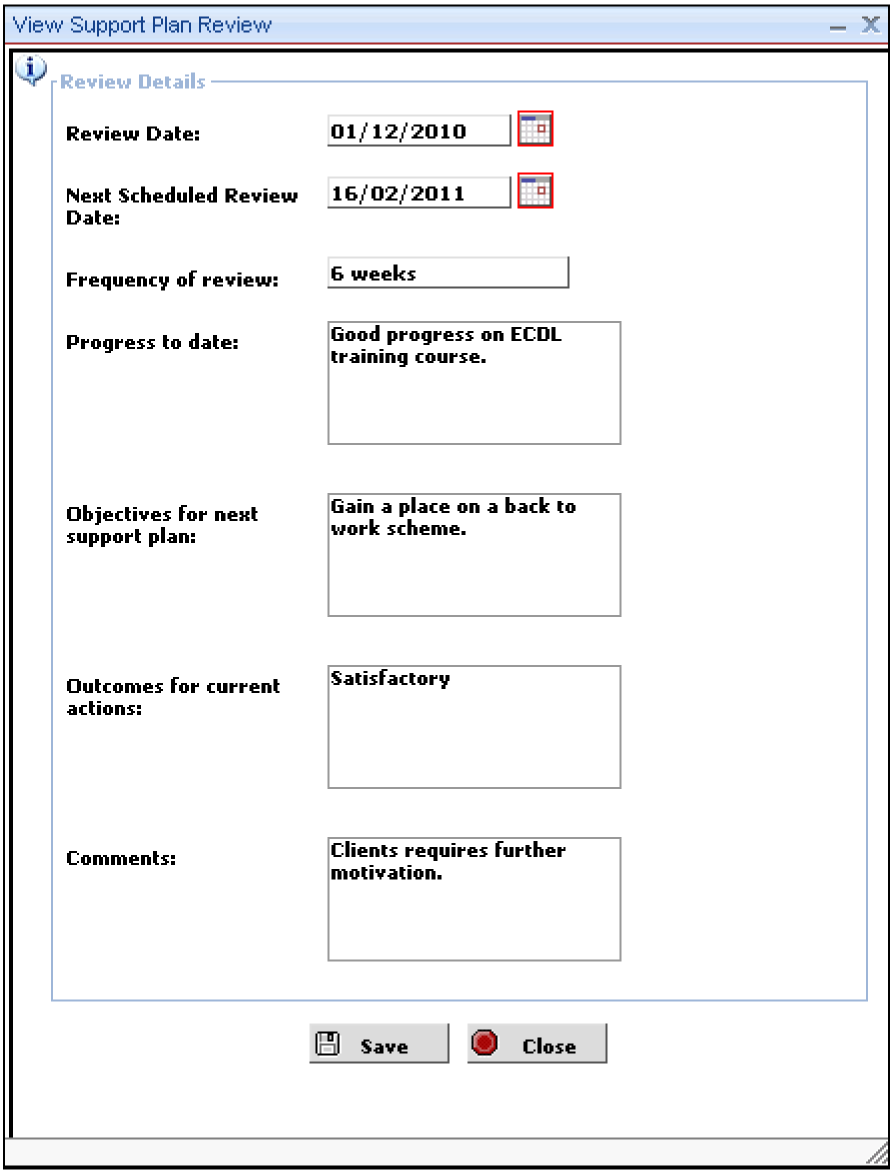
Using the support plan you created in the previous exercise, fill out three support plan actions for different support areas. Save the actions, and then open them again, this time saving the full outcome to the actions.

NOTES

13.4. Manage Support Plan Reviews

Periodic reviews should be recorded against each support plan. With each review, progress updates should be recorded, and dates should be set for any future review.

The support plan review tab is as shown here:



The above dataset is described as follows:

Field	Field Type	Description
Review Date	Date (mandatory)	The date the review took place
Next Scheduled Review Date	Date (mandatory)	The targetted date for the next review

Frequency of Review	Text (mandatory)	The desired frequency of the support plan review process
Progress to Date	Text (not mandatory)	A summary of progress to date for this client's support plan
Objectives for next support plan:	Text (not mandatory)	A set of overarching objectives for the next support plan, ideally that can be broken in to actions.
Outcomes for current actions:	Text (not mandatory)	A view of the progress of the current support plan actions.
Comments	Text (not mandatory)	Any user comments

13.4.1. Exercise

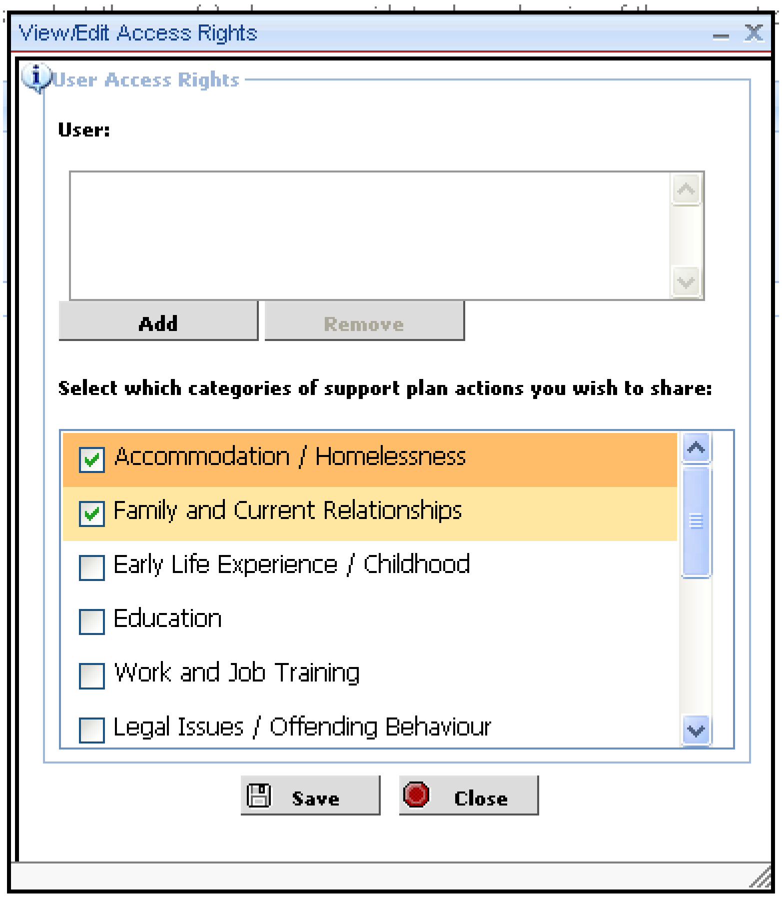
Using the support plan you created in the previous exercise, fill out a support plan review as per the dataset described above.

NOTES

13.5. Manage Support Plan Access Rights

By default, only the project worker/manager and their project manager have access to the support plan. All other users will not have access to the support plan by default. The support plan creator (or their manager) can give permission to other users to view certain domains within the support plan actions based on their project or username.

When adding a user to the support plan access tab, you are presented with the following:



The above dataset is described as follows:

Field	Field Type	Description
User	Multi-select(mandatory)	A multiple group of users who may access the chosen domains within the support plan
Categories	Multi-select(mandatory)	A multi-select list of support plan domains that can be release to other users.

13.5.1. Exercise

Using the support plan you created in the previous exercise, give support plan access rights to another user or users to a set of domains in the support plan.

NOTES

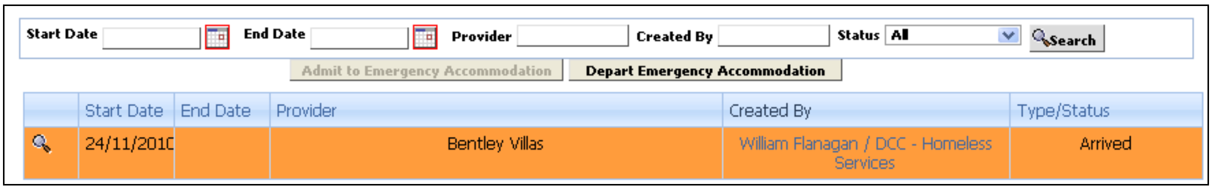
14. CLIENT – EMERGENCY ACCOMMODATION

PASS provides users with the ability to manage the clients' Emergency Accommodation. Emergency Accommodation should always be managed via the CPS, however the full history is provided on the client screen. For further details on the Centralised Placement Service, see the CPS sections earlier in this document.

14.1. Viewing Existing Emergency Accommodation

In order to view the Emergency Accommodation History for the client, you must navigate to the "Emergency Accommodation" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing Emergency Accommodation for this client, as shown below:



Note that a set of filter criteria is provided so as to enable you to find specific case notes that match the criteria.

14.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Emergency Accommodation tab and view if there are any emergency stays for the client. Use the search criteria to filter any case notes that may exist.

NOTES

14.2. Manage Emergency Accommodation

The project worker can manage the emergency accommodation status for the user via this screen by using the buttons on the top of this tab, i.e. "Admit to Emergency Accommodation", "Depart Emergency Accommodation". As both of these are identical to items described earlier in this manual, this will not be covered again here.

Note: *the user cannot create a new Emergency Accommodation stay for a client if any of the following conditions prevail:*

- *The client is already in Emergency Accommodation (they must be discharged first)*
- *The client is currently in a long term tenancy (must exit tenancy first)*

14.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Emergency Accommodation tab and create a new record for the client. Notice how the buttons change from being enabled to disabled based on the status.

NOTES

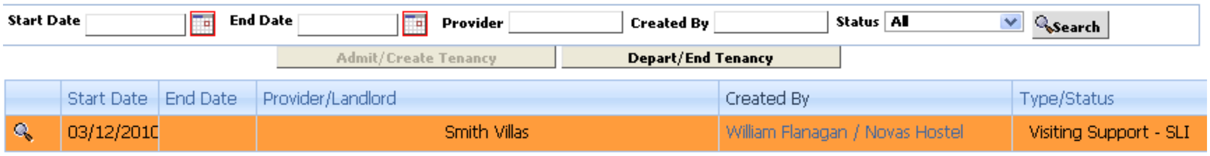
15. CLIENT – LONG TERM ACCOMMODATION

As it is a goal of the Pathway model for a client to achieve a long term tenancy within a six month period, it is important that users record the client's long term accommodation status.

15.1. Viewing Existing Long Accommodation

In order to view the Long Term Accommodation History for the client, you must navigate to the "Long Term Accommodation" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing Long Term Accommodation for this client, as shown below:



Note that a set of filter criteria is provided so as to enable you to find specific case notes that match the criteria.

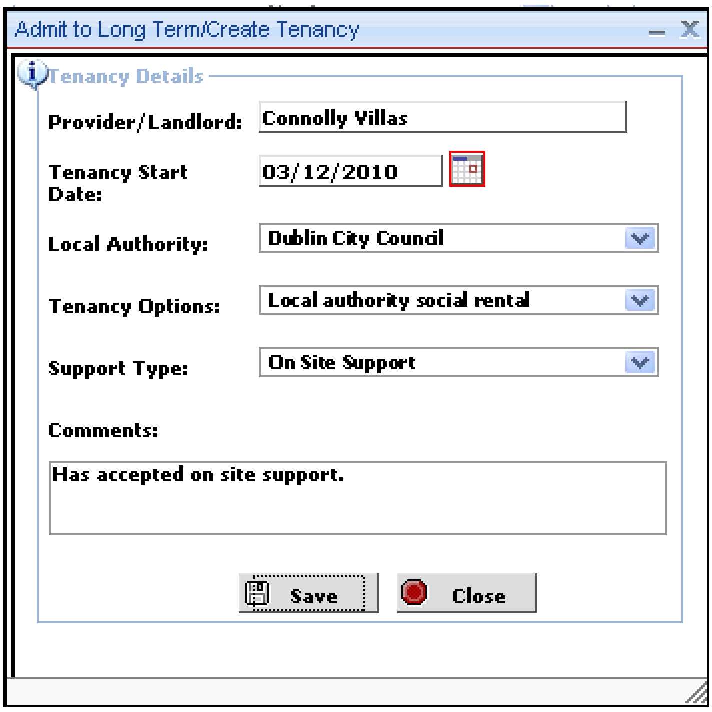
15.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Long Term Accommodation tab and view if there are any emergency stays for the client. Use the search criteria to filter any case notes that may exist.

NOTES

15.2. Manage Long Term Accommodation

The project worker can manage the long term accommodation status for the user via this screen by using the buttons on the top of this tab, i.e. "Admit/Create Tenancy", "Depart/End Tenancy". When you create a tenancy, you are provided with the following dialog.



The above dataset is described as follows:

Field	Field Type	Description
Provider/ Landlord	Text (mandatory)	The provider of the Long Term accommodation
Tenancy Start Date	Date (mandatory)	The date that the tenancy started
Local Authority	Dropdown (mandatory)	The Local Authority overseeing the long term tenancy
Tenancy Options	Dropdown (mandatory)	Select the tenancy options that apply to this long term accommodation.
Support Type	Dropdown (mandatory)	The support type that applies, e.g. Visiting Support SLI
Comments	Text (not mandatory)	Any user comments

Note: *the user cannot create a new Long Term Accommodation stay for a client if any of the following conditions prevail:*

- *The client is already in Emergency Accommodation (they must be discharged first)*

- *The client is currently in a long term tenancy (must exit tenancy first)*

15.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Long Term Accommodation tab and create a new record for the client. Notice how the buttons change from being enabled to disabled based on the status.

NOTES

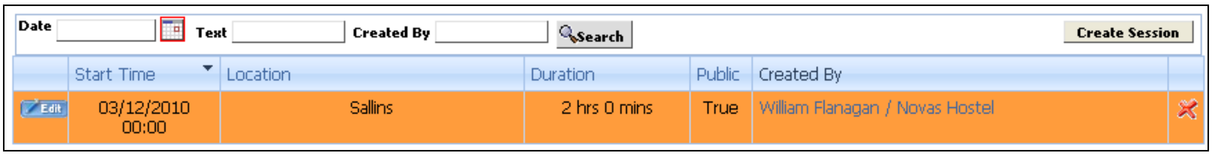
16. Client Keyworking Sessions

The Keyworking Sessions feature provides keyworkers with a mechanism to record the details of their sessions with the client, including duration and location of the session.

16.1. Viewing Keyworking Sessions

In order to view the existing Keyworking Sessions for the client, you must first search for (or create) the client on PASS, and then navigate to the "Keyworking" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing Keyworking for this client, as shown below:



Note that a set of filter criteria is provided so as to enable you to find specific keyworking sessions that match the criteria.

16.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Keyworking Sessions tab and view if there are any sessions for the client. Use the search criteria to filter any case notes that may exist.

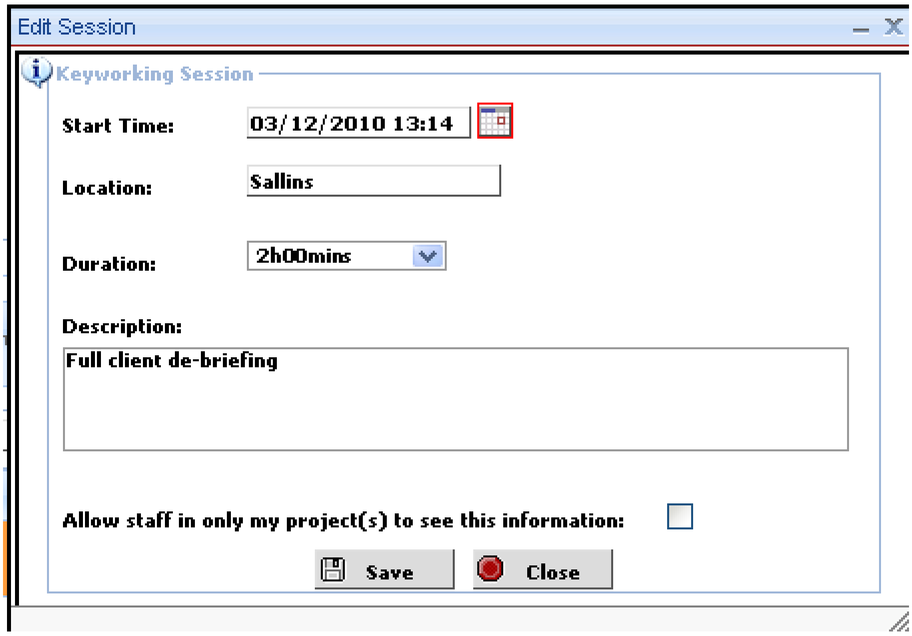
NOTES

16.2. Add or Edit Keyworking Sessions

To add a new Keyworking Session, simply click the "Create Session" button on the top right of the Keyworking Session tab. Alternatively, you can edit an existing

Keyworking Session by clicking on the Edit icon next to the Keyworking Session in question.

In either case you will be presented with a dialog as follows:



The above dataset is described as follows:

Field	Field Type	Description
Type	Date/time(mandatory)	The date/time when the keyworking session began.
Location	Text (mandatory)	The location where the keyworking session took place.
Duration	Dropdown (mandatory)	This is a dropdown list containing a range of durations allowing the user to state how long the session took.
Description	Text (not mandatory)	A description of the record entered by the user.
Allow staff in only my project(s) to see this information:	Checkbox	If checked, only users within the same project as the user who recorded the Keyworking Session will be able to see the note.

16.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Keyworking Session tab and create a new record for the client. Make the note visible to colleagues in your own project.

NOTES

17. LINKED CLIENTS

PASS contains a facility to allow the linking of clients together by their relationship. Each client must have their own individual record, therefore one record does not contain couples. To facilitate the need for service providers to be aware of relationships/housing needs, relationships can be recorded on PASS through the "Linked Clients" feature.

17.1. Viewing Linked Clients

In order to view the existing linked clients for the client, you must first search for (or create) the client on PASS, and then navigate to the "Linked Clients" tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing links for this client, as shown below:

Create Linked Client

	Name	Relationship	Is Next of Kin	
Edit	John Davies	Father	False	

17.1.1. Exercise

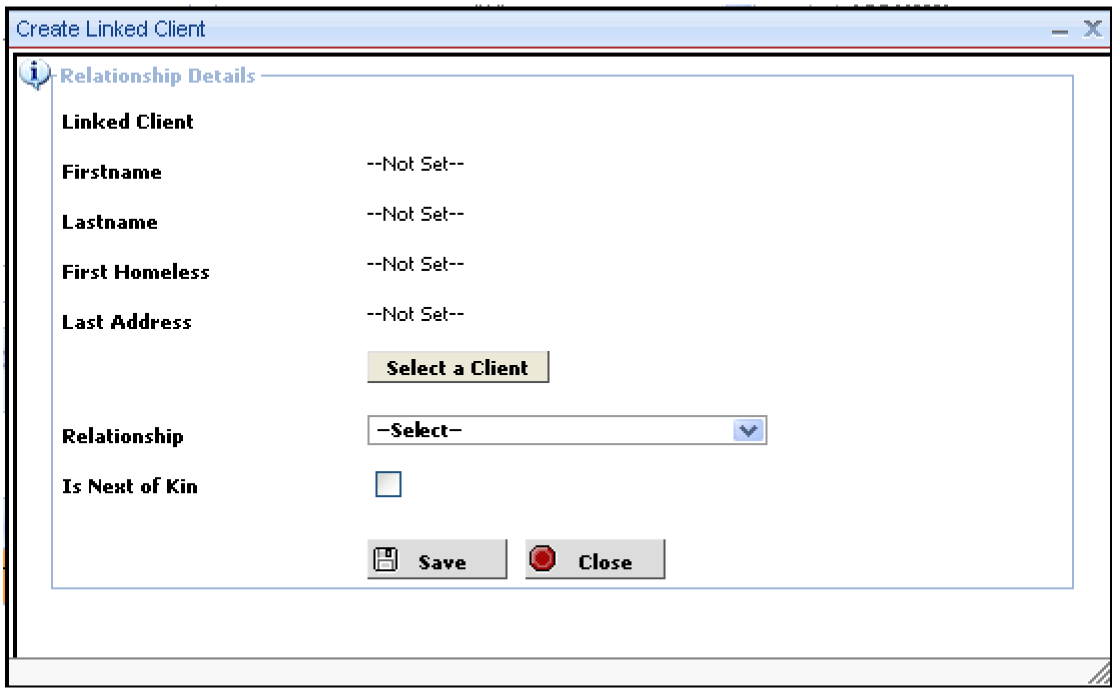
For one of the clients created in a previous exercise, browse to the Linked Client tab and view if there are any links for the client.

NOTES

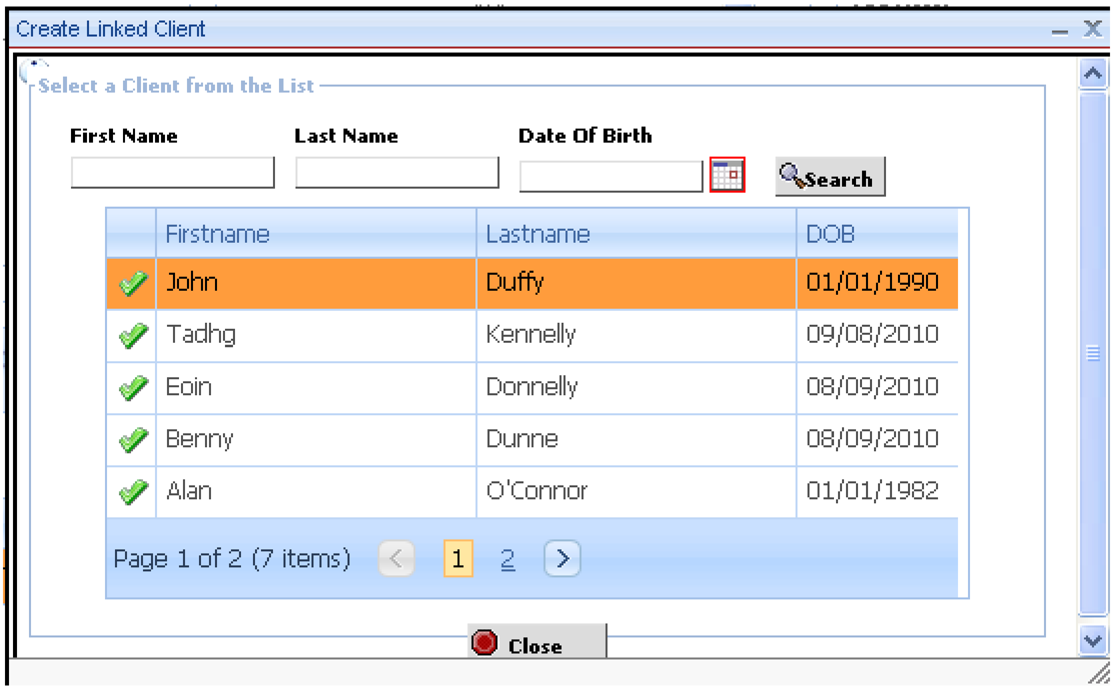
17.2. Add or Edit Linked Client

To add a linked client, simply click the "Create Linked Client" button on the top of the Linked Client tab. Alternatively, you can edit an existing Link by clicking on the Edit icon next to the Link in question.

In either case you will be presented with a dialog as follows:



You must click the "Select a Client" button to search for a client to link to, which shows the following dialog:



Used the search criteria to find the linked client, and then click the ✔ icon.

The Linked Client dataset is described as follows:

Field	Field Type	Description
First Name	Text (read-only)	The first name of the linked client

Last Name	Text (read-only)	The last name of the linked client
First Homeless	Text (read-only)	The date of first homelessness for the client
Last Address	Text (read-only)	The last know address for the linked client
Relationship	Dropdown (mandatory)	This is a dropdown list containing a list of relationships available.
Is Next of Kin	Checkbox	If checked, the linked client is marked as the next of kin for this client.

17.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Linked Clients tab and create a new record for the client.

NOTES

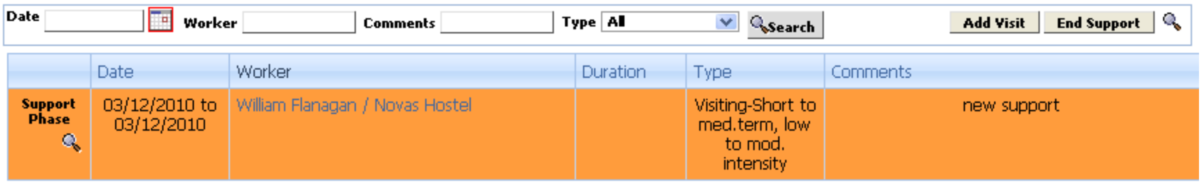
18. CLIENT – VISITING SUPPORT

PASS provides the facility to record the details of Visiting Support (e.g. SLI) visits to clients who are currently resident in a Long Term Tenancy.

18.1. Initiating Visiting Support

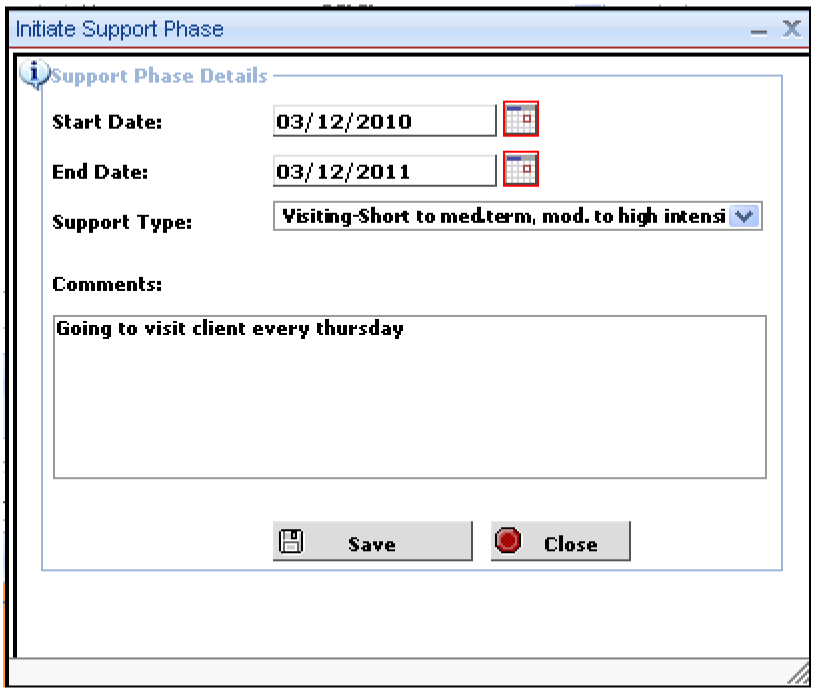
In order to view the existing Visiting Support for the client, you must first search for (or create) the client on PASS, and then navigate to the Visiting Support tab on the LOWER part of the client page.

You will be presented with the following dialog which shows all the existing Visiting Support for this client, as shown below:



Note that a set of filter criteria is provided so as to enable you to find specific case notes that match the criteria. Note also, that Visiting Support is deal with in phases. A phase of visiting support must first be "initiated" before any visits can be added.

When you initiate Visiting Support you are presented with the following dialog:



This dataset is described as follows:

Field	Field Type	Description
Start Date	Date(mandatory)	The date that visiting support was

		initiated
End Date	Date (mandatory)	The expected end date of this phase
Date	Date (mandatory)	The date of the Action / Case Note
Support Type	Dropdown(not mandatory)	The type of Visiting Support that will be provided in this phase.
Comments	Text (not mandatory)	Any user comments to add.

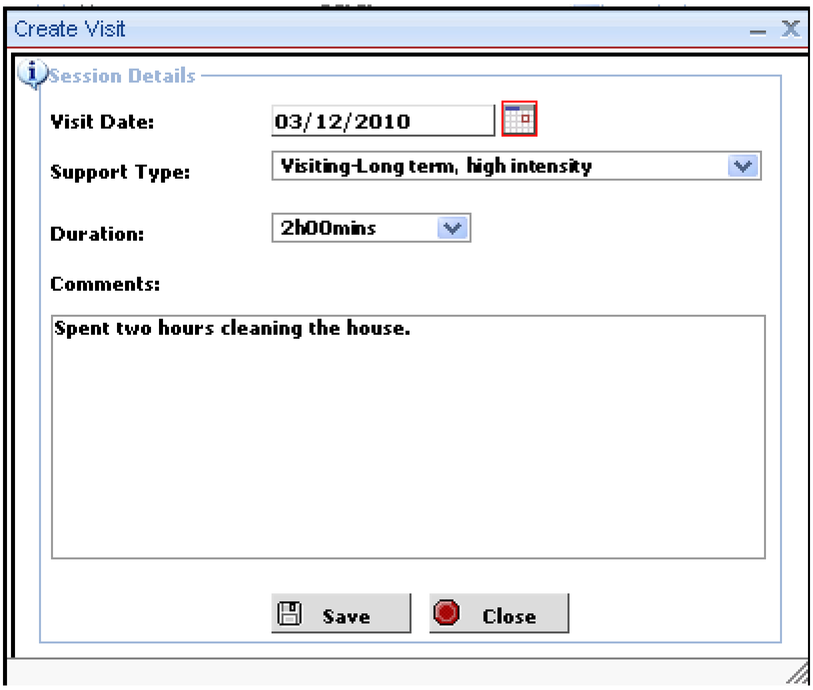
18.1.1. Exercise

For one of the clients created in a previous exercise, browse to the Visiting Support tab and initiate a support phase for the client.

NOTES

18.2. Adding a Visit

To add a Visiting Support visit to a phase, simply click the "Add Visit" button on the top right of the "Visiting Support" dialog. You will be presented with a dialog as follows:



The above dataset is described as follows:

Field	Field Type	Description
Visit Date	Date(mandatory)	The date that visiting support occurred
Support Type	Dropdown(mandatory)	The type of Visiting Support that will be provided in this phase.
Duration	Dropdown (mandatory)	A list of time values that that specify how long the last visit took
Comments	Text (not mandatory)	Any user comments to add.

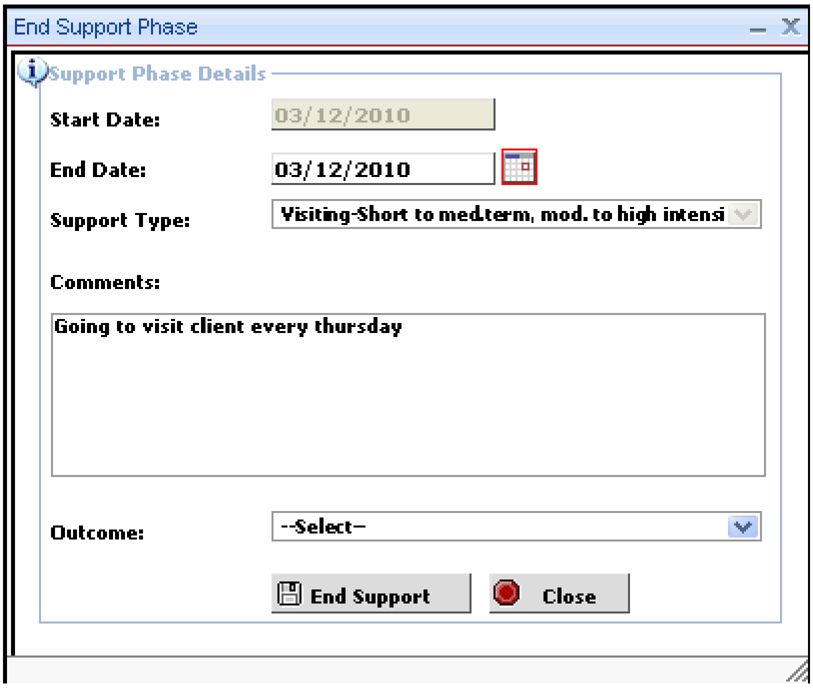
18.2.1. Exercise

For one of the clients created in a previous exercise, browse to the Visiting Support tab and create a new Visit for the client.

NOTES

18.3. Closing the Support Phase

To close a Visiting Support visit to a phase, simply click the "End Support" button on the top right of the "Visiting Support" dialog. You will be presented with a dialog as follows:



The above dataset is described as follows:

Field	Field Type	Description
Start Date	Date(readonly)	The date that visiting support occurred
End Date	Date(readonly)	The date that the phase was ended
Support Type	Text (readonly)	The type of Visiting Support that will be provided in this phase.
Duration	Dropdown (mandatory)	A list of time values that that specify how long the last visit took
Comments	Text (not mandatory)	Any user comments to add.

Outcome	Dropdown (mandatory)	The user selects the outcome of the visiting support phase from this dropdown.

18.3.1. Exercise

For one of the clients created in a previous exercise, browse to the Visiting Support tab and end this support phase for the client.

NOTES

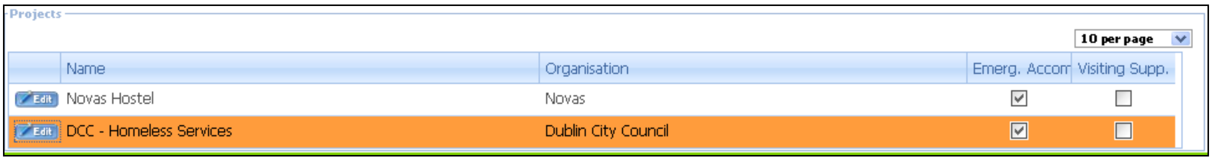
19. Edit Projects (PMR Only)

Project Managers have the ability to manage certain aspects of their project, as well as the ability to add new users to their project.

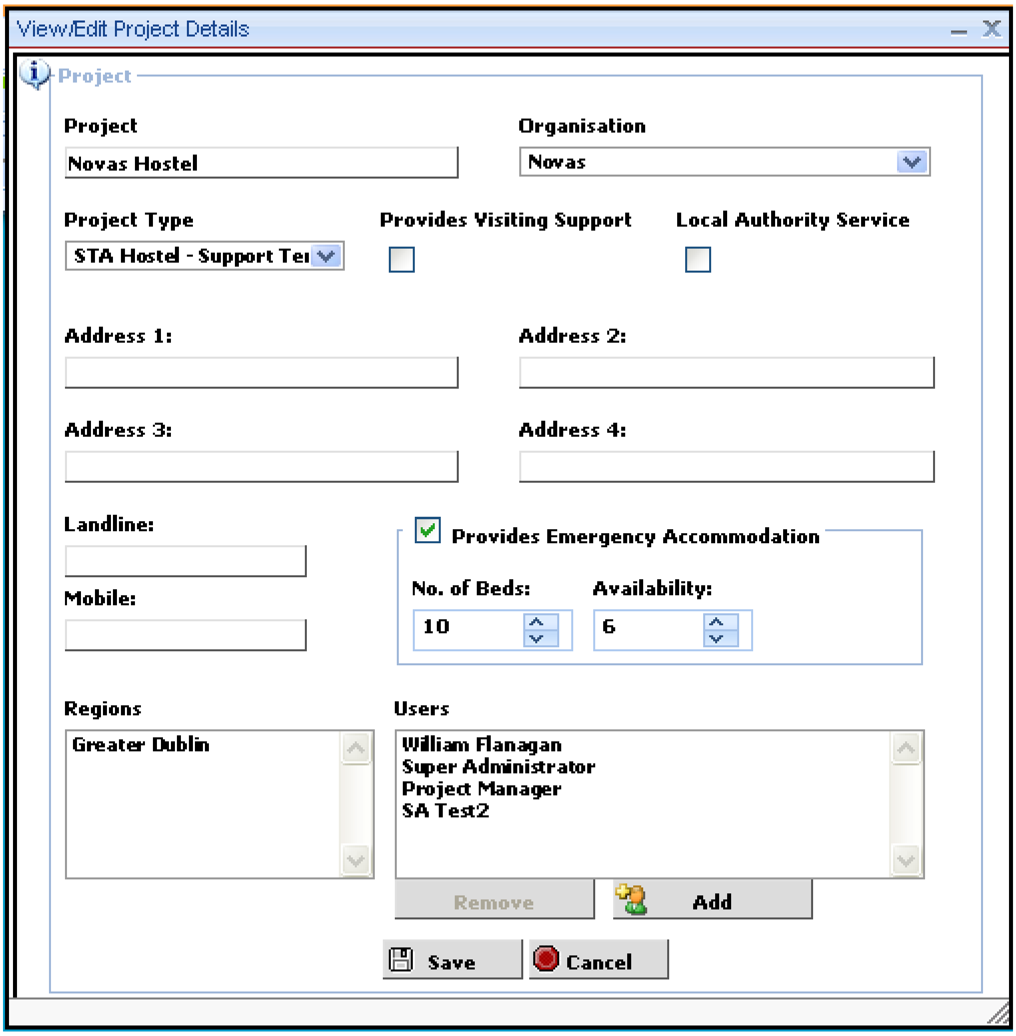
19.1. Manage Projects

On the upper navigation bar, select Admin > Manage Projects.

You will be presented with the following dialog which shows all the projects that you are project manager of, as shown below:



Clicking on the "Edit" icon presents the following dialog:



The project dataset is described as follows:

Field	Field Type	Description
Project	Text (read-only)	The name of the project
Organisation	Dropdown (mandatory)	The organisation that owns this project
Address 1	Text (not mandatory)	The first line of the address
Address 2	Text (not mandatory)	The second line of the address
Address 3	Text (not mandatory)	The third line of the address
Address 4	Text (not mandatory)	The fourth line of the address
Landline	Text (not mandatory)	The landline contact number for this project
Mobile	Text (not mandatory)	The mobile contact number for this project
Provides Emergency Accommodation	Checkbox	Whether or not this project provides emergency accommodation
No of Beds	Numeric	The number of beds in the accommodation. Required if Emergency Accommodation is checked.
Availability	Numeric	The current availability. Required if Emergency Accommodation is checked.
Regions	Read-only list	The region that this project belongs to.
Users	Multi-select (mandatory)	Manageable list of users that belong to this project

19.1.1. Exercise (Project Manager only)

Manage your project and add address and contact details.

NOTES

19.2. Manage Users

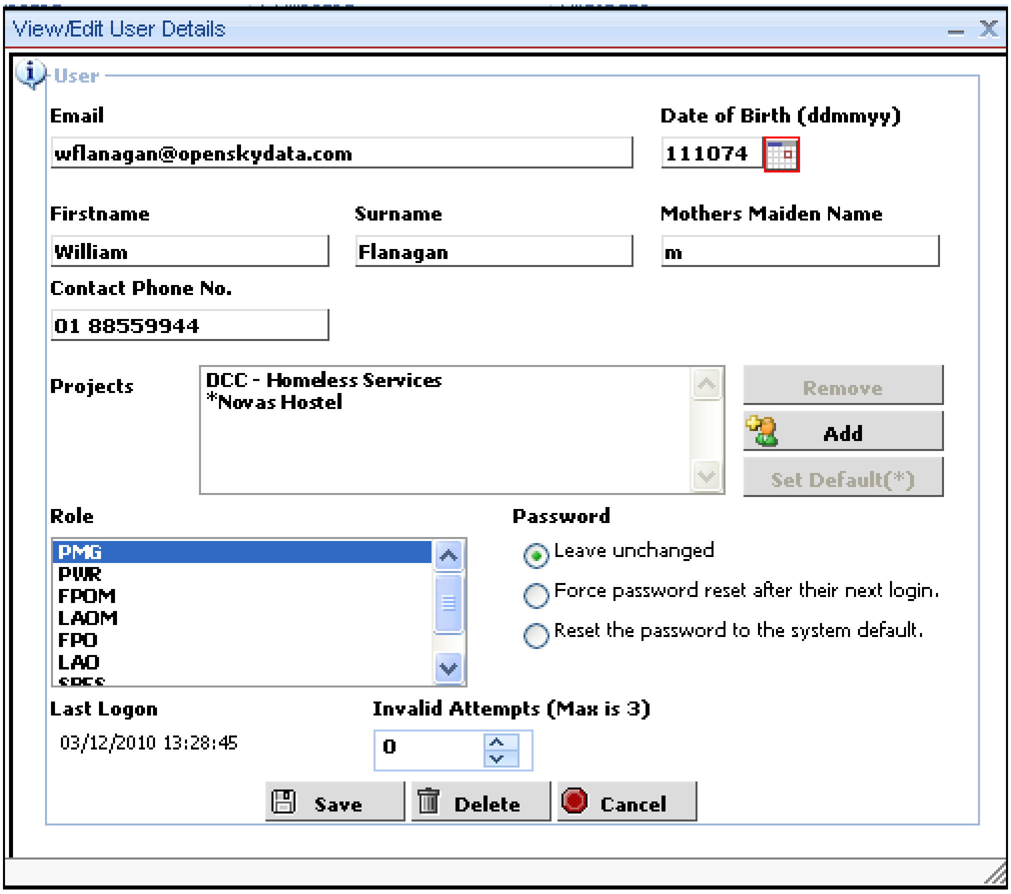
A project manager can manage the users in their project by going to the upper navigation bar, and selecting Admin > Manage Users.

You will be presented with the following dialog which shows all the users that are members of projects that you manage, as shown below:

Username | First Name | Surname | Project | Role | Search

	Username	Firstname	Surname	Projects	Role	Last Logon
Edit	wflanagan@openskydata.c	William	Flanagan	DCC - Homeless Services, Novas Hostel	PMG	03/12/2010 13:28:45
Edit	pmg@dublincity.ie	Project	Manager	DEpaul james street, Simon Shelter, Novas Hostel	PMG	04/11/2010 10:24:50
Edit	lao@dublincity.ie	Local	Authority	DCC - Homeless Services	LAO	12/08/2010 16:56:48
Edit	homelessservices@dublinci	Local	Authority	DCC - Homeless Services	LAO	
Edit	freephonetest2@dublincity	Freephone	Test2	DCC - Homeless Services	FPO	12/08/2010 12:04:23
Edit	freephonemanager@dublir	Freephone	Manager	DCC - Homeless Services	FPOM	12/08/2010 11:59:13
Edit	freephone@dublincity.ie	Freephone	Operator	DCC - Homeless Services	FPO,SRES	08/10/2010 09:40:35
Edit	fpo@fpo.ie	fpo	fpo	DCC - Homeless Services	FPO	22/04/2010 12:47:08

As can be seen above, search criteria has been provided to allow for filtering of the user list. Clicking on the "Edit" icon, or by clicking the "Add User" icon presents the following dialog:



The following general user fields can be modified:

Field	Field Type	Description
Email	Text (mandatory)	The user's email address (will also become the user's logon name)
Date of Birth	Date (mandatory)	The user's Date of Birth (required for login purposes).
First Name	Text (mandatory)	The user's first name
Last Name	Text (mandatory)	The user's last name
Mother's Maiden Name	Text (mandatory)	The user's mother's maiden name (required for login purposes).
First Name	Text (mandatory)	The user's first name
Contact Phone No.	Text (not mandatory)	The contact number for this user
Projects	Multi-select (mandatory)	A list of projects that the user belongs to (the project manager can only add projects that he himself is a member of).

Role	Multi-select (mandatory)	The role or roles assigned to the user

The following fields apply exclusively to user password management.

Field	Field Type	Description
Password	Radio Button (mandatory)	The project manager can choose one of the following options: • Leave the password unchanged • Force the user to change password at the next login • Reset the password to the system default (which is "password").
Invalid Attempts	Numeric (mandatory)	This is the running total of in-valid login attempts for the user. Each time the user successfully logs in, this is reset to 0. When this number reaches 3, the account is locket. The project manager can reset the account by setting this number back to 0.

19.2.1. Exercise (Project Manager only)

Add a user to your project and assign a role to them. Log out and confirm that you can log in as the user you have just added.

NOTES

20. Appendices