Training Manual

How to Use LINK

Introduction to the LINK Client Recording System

Annotated version for trainers

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Welcome to LINK training

Today you will learn to use the LINK client recording system. Your trainer will discuss course objectives and timetable with you, but typically the course takes 3 hours and goes as follows:

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What is LINK? What is it used for?

2 Sharing and Protecting Data

How data is shared.
How data is protected.
Obtaining client consent.

3 Finding a Client

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4 Entering a New Client

Recording client consent & details.

Tea & coffee break

Recording, filtering & sorting actions.

5 Printing Client Information

Printing client information.

6 Passwords

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7 Practise and Final Questions

Course evaluation

What is LINK?

LINK is a Web based client recording system. It was developed in Dublin in 2001 by the Homeless Agency, Resource Information Service and homeless service providers.

CLIENT INFORMATION:

Entered and controlled by frontline workers

Immediately visible to all permitted users

LINK client recording system

CLIENTS

Receive improved continuity of care

Better services

PROJECT WORKERS

Access up to date information

Less duplication of other agencies work

Coordinate activities

DECISION MAKERS

Manage resources

Measure impact of programmes

Improve services

How you might use LINK:

Example 1:

We encouraged one of our clients to join a drug detox programme. Then he disappeared and we wondered what happened to him. We looked up his record and saw that he had gone to Dublin Simon Detox. The name of his project worker was there so we could ring and see how things were going.

Example 2:

When I check my client's details in LINK I can find out what my colleagues did in a previous shift. This brings me up to speed right away.

What data can you record?

Client Details

First Name & Surname
Date of Birth
Age
Gender
Nickname
PPSN
Client ID
Family Status
Local Authority Area
Homeless Status
Have You Ever Slept Rough?
If So, How Long
Contact At Other Service
Housing Register

Homeless Register
Homeless Register Application Date
Date of First Homelessness
First Experience of Homelessness?
How Long Homeless
Medical Card Details
GP Contact Details
Physical Disability
Training
Have You Any Literacy Difficulties?
Are You Interested In Training? If Yes, What Kind?
Education
1st-2nd-3rd Causes/Risk Of Homelessness
(LINK also records the name and agency of person entering the client)

Actions & Outcomes

Category (Type of Action)
Action/Outcome
Date of Action

Notes (shared with all LINK users)
Private Notes (shared with staff of own agency)

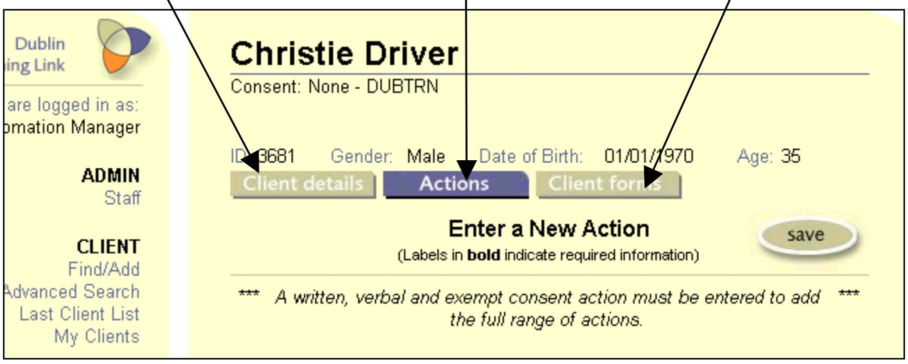
Client Profile Form

Ethnic Origin
Citizenship
Native Language

Next of Kin
Children Living Arrangements
Main Source Of Income

How is client data shared?

Client Details	Actions/Outcomes	Client Profile Form
Information about the client	Actions done by an agency or the client	Information about the client
All LINK users can read and edit these details	All LINK users can read actions Only the agency that enters an action can edit or delete it "Private Notes" and actions created under the "Subsidiary" category are an exception - only the agency that records this information can read it.	Only the agency that creates a form can edit and read it Each agency can create a form for a particular client
The Homeless Agency can read all of the above.		



How is client data protected?

1 **Consent**

Clients must give consent if more than name, date of birth & gender are recorded.
They can refuse or withdraw consent.
They can view their information or request a printout.

2 **Banking Level Security**

LINK has the same level of security as a bank.
It is more secure than e-mail or Microsoft Word documents.

3 **Restricted Access**

Only homeless service providers & the Homeless Agency have access.
Access is controlled by password.
You are logged out after 30 minutes of inactivity.
Passwords:
- only last ninety days.
- are cancelled when an employee moves on.
- lock after 3 unsuccessful login attempts (similar to debit card pin security).

4 **Accountability**

Each LINK user is responsible for his/her own data.
Clients and LINK users can ask for incorrect or inappropriate data to be corrected.

5 **Awareness**

Agencies must register with the Data Protection Commissioner.
LINK users are trained to understand their responsibilities.

6 **Participation**

Dublin LINK User Group discusses data sharing and protection issues.
Each organisation that uses LINK can send a representative.

Who does what?

Project worker

- Enters meaningful, accurate information
- Discusses consent with client
- Changes own password regularly
- Shares password with no one

Project leader

- Ensures that project workers receive adequate training
- Manages passwords for own agency
- Ensures that data is accurate and protected
- Runs reports for own agency

Homeless Agency

- Maintains & manages LINK
- Provides training & supports users
- Issues passwords
- Processes requests for information
- Runs reports

Dublin LINK Users Group

- Discusses LINK usage, data protection and technical issues
- Proposes improvements

Getting started

Following are the instructions for opening LINK on computers running the 'Internet Explorer' Web browser. If your organisation uses a different set up, some steps may be slightly different -- if necessary, your team leader can help you.

- Click **Start**
- Click **Internet Explorer**

  TRAINER TIP LINK cannot be found through Google as it is not on the World Wide Web, it is private. Trainees should therefore type the LINK web address into the Internet Explorer Address box.

  COURSE SET-UP Make sure the web-browser Address box is visible on each computer. If it is not, and you are using Internet Explorer, click View > Toolbars > Address Bar to display it.

- In the Address box, enter **https://dublin.linksystem.org.uk**
- Click **Go** or press **Return**
- Enter your username:

  username: ______________________

- Click **Login**
- Enter your password:

  password: ______________________

- You will be asked one of the following security questions:

  date of birth: *010101*

  mother's maiden name: *smith*

- The LINK Welcome screen appears. Your fictitious agency for today is:

  agency: *Accommodation Service Providers*

You have now logged on to the LINK Training Website. All of the information on this site is fictitious and may not be realistic.

Tips for logging on

- Do not use slashes when you are entering a birth date to open LINK. Use the format 010101, not 01/01/01. (The opposite applies when entering dates within LINK -- there you should use slashes, and 4 digits for the year).
- Be careful to enter the username and password EXACTLY as given to you in this manual. This means not using a capital letter or space unless it is specified.

Logging on quickly with Favorites

On your first visit to the LINK website, you can "save the website to Favorites". Then, on future visits you can simply pick LINK from the Favorites menu to open the site.

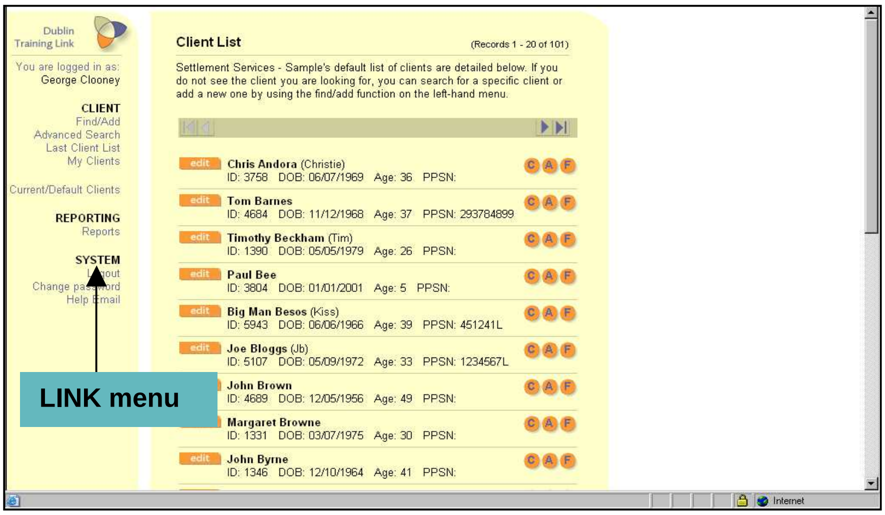
To save a website to Favorites:

- Go to the website
- Click **Favorites** (on bar at the top of the screen)
- Click **Add to Favorites**
- Click **OK**

Welcome screen

- See your fictitious name at the top left (under “You are logged in as:”)
- This list is called **Current/Default Clients** - it displays clients currently admitted to your agency (but not yet departed)

EXTRA KNOWLEDGE	To be precise, the Current/Default Clients list displays all clients for whom the agency has registered an admission action but no departure action.



Finding a client

If you have a Client ID, you know that the person is already in LINK because this is a LINK number. To find his/her details, do the following:

- Click **Find/Add** on the LINK Menu
- Enter the **Client ID**
- Click **Find** button

If you do not have a Client ID, do the following:

- Click **Find/Add** on the LINK Menu
- You need to enter some information (called 'search criteria') in order to find a client record.

  There are many possible ways to search. For example, you could search using just the PPS number, a first name AND last name, or a date of birth AND/OR last name.
- Click **Find** button

PRACTICE EXERCISE: Finding a client

Try finding a record for Timothy Beckham.

Did you find it?

____

What search criteria did you use?

____

____

____

____

PRACTICE EXERCISE: Effective searching

Joe Soap's PPS number is 1234567X, his date of birth is 01/12/1954, and his nickname is Rabbit. Try finding his record in each of the following ways. Which of these are good methods? Which are not and why?

Firstname: Joe
Surname: Soap ☐ Good ☐ Poor

PPS number: 1234567X ☐ Good ☐ Poor

Firstname: joseph
Surname: soap ☐ Good ☐ Poor

Firstname: Jo
Surname: Soap ☐ Good ☐ Poor

Firstname: Joe ☐ Good ☐ Poor

Date of birth: 01/12/1954
Surname: Soap ☐ Good ☐ Poor

Nickname: Rabbit ☐ Good ☐ Poor

Any name: Soap ☐ Good ☐ Poor

Tips for the Joe Soap exercise

Joe Soap	This may cause a problem if the person has previously been registered as 'Joseph'. You could search with 'Jo' and 'Soap' instead.
1234567X	Using a PPS number is an excellent way of searching as every PPS number is unique. It has one drawback, however -- it won't work if nobody has previously entered the PPS number for this client.
joseph soap	This may cause a problem if the person has previously been registered as 'Joe'. You could search with 'Jo' and 'Soap' instead. Note that it does not matter whether you use capital letters or not.
Jo Soap	This is a good way of searching. If you find more than one person, you will need to check the details of each.
Joe	This is not enough information as there may be hundreds of people called Joe.
01/12/1954 AND Soap	This is a good way of searching. Remember, though, if the answer comes up negative, try another kind of search to be sure. LINK accepts approximate dates of birth, and you can't be sure how existing information might been entered.
Rabbit	Sometimes people have quite a few names. You may not know which name box to search in. To solve this problem, enter the name in the "Any name field" in the search window. LINK will search for it in first name, nickname or surname boxes.

EXTRA KNOWLEDGE   If you enter a search term in the Any Name field, LINK will find all records that match it in the First Name, Surname and Nickname/aka fields, but not in the Other Name field. Note that the Other Name field appears on the Client Details screen, but not on the Find/Add a Client screen.

TRAINER TIP   As in databases generally, duplicate records are a significant problem in LINK. If a client is registered two or more times, the Link Coordinator at the Homeless Agency must reconcile them. The two most common causes of this problem are: (1) clicking Add instead of Find in the Find/Add window, and (2) not checking to see if a client is already in LINK when entering him/her as a new client.

Adding a new client

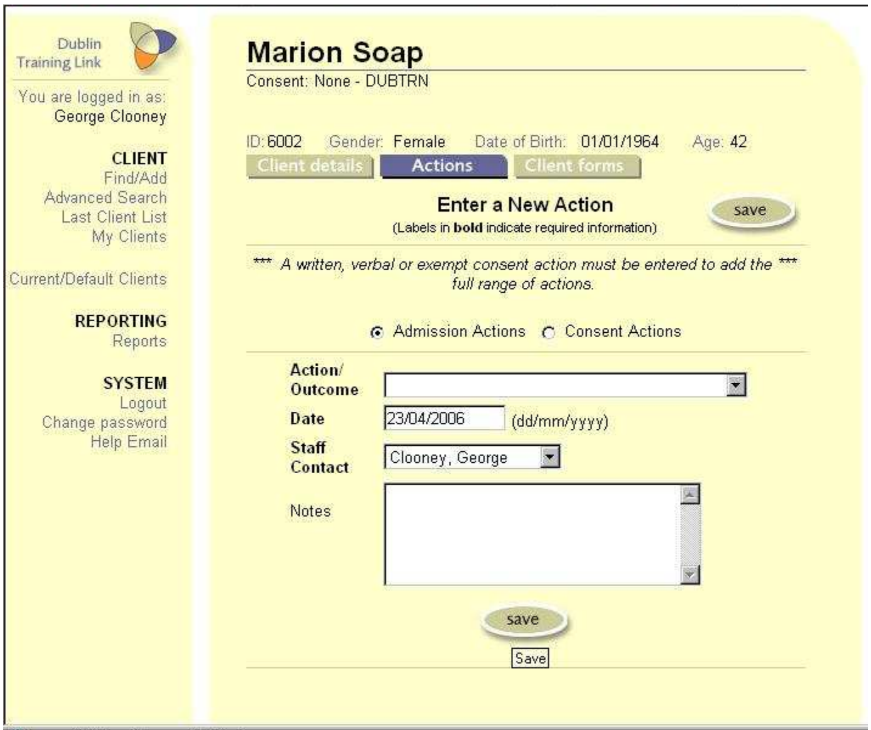
When you register a new client, it is very important to check to see if he/she is already in LINK before creating a new record. If he/she is not, add the record as follows:

> TRAINER TIP New database users may not appreciate the importance of checking to see if a client is already in LINK before creating a new record. You might want to have a discussion about the problems created when duplicate records exist for a single individual.

- Click **Add Client**
- Fill in at least **First Name, Surname, Date of Birth** and **Gender**. Note that you will need to enter the **Date of Birth** even if you entered it while searching, as it will not be carried forward to this screen.
- Click **Save Details** (The button is at the bottom of the screen.)

Entering a Consent Action

After you click **Save Details,** LINK will bring you automatically to the **Enter a New Action** screen, seen below. IMPORTANT: You must confirm that you have the client's consent before entering any further information.



- Click **Consent**

  TRAINER TIP   Failing to click 'Consent' and register a consent action is a common mistake made by new users. It can confuse them because, without consent, LINK refuses to allow them to register further information.

- Choose an **Action/Outcome**
- Check that the **Date** given is the day that the client gave consent. If not, enter the correct date.
- Click **Save** (not **Save and Continue**)
- If necessary, click **OK** to confirm the date.
- NOTE: if you do not record a written or verbal consent action, LINK will not allow you to enter any further information for the client.

Entering Client Details

- Click **Client Details**
- Click **Edit** (at the top of the screen)
- Fill in the form. Note that your name is recorded at the bottom of the form.
- Click **Save Details**
- If you want to double-check the information, click **Review the Record**.

Entering a private Client Form

- Click **Client Forms**
- Click **New** (right hand side of screen)
- Fill in the form.
- Click **Save**
- Click **OK**
- If you wish to go back and change any information, click **Current**.

Entering an Admission Action

- Click **New**
- Make sure that **Contact/Admission** is selected
- Choose an **Action/Outcome**
- Check that the **Date** and **Staff Contact** are correct
- Click **Save**
- If necessary, click **OK** to confirm the date

Entering other actions

TRAINER TIP This is a good time to discuss the Action/Outcome dropdown list. It is important that the trainees become very familiar with this list because most data entry involves using it.

EXTRA KNOWLEDGE You can use the Action/Outcome drop-down list in the Actions window as a filter. For example, select 'Referral Actions' from this list if you want to see only those actions in the client history. When you are finished, choose 'All Action Types' at the top of the drop-down list to see the complete history.

TRAINER TIP Trainees often pick an action from the drop-down list in the Actions window before clicking 'New' to create a new action. They should not do this -- they should click 'New' first.

After entering consent and admission actions, you can enter other actions:

- Click **New**
- Choose an action category
- Choose an **Action/Outcome**
- Check that the **Date** and **Staff Contact** are correct
- **Notes** are visible to all LINK users - keep them to a minimum or enter none at all
- **Private Notes** are not visible to other homeless services - only record them if it is your organisation's policy to use this box for case notes

  TRAINER TIP The 'Private Notes' box was added to LINK at the request of homeless services that wanted to use the system for their case notes. It is worth stressing to trainees not to use this box unless their organisation has decided to use it for this purpose.

- Click **Save** (not **Save and Continue**)
- If necessary, click **OK** to confirm the date.

PRACTICE EXERCISE PART 1: Entering a New Client

Try entering a client on to the database with the following information. Remember to check first to see if the person is already in the database. Assume that you have already spoken to her, and she has given written consent to put her details on the database.

First name:	Paula
Surname:	(assigned by trainer)
Date of Birth:	24/03/1964
Gender:	Female
Family Status:	Single with children
Homeless Status:	Transitional accommodation
Local Authority Area:	Dublin City Council
Contact at Other Services:	Social worker
Housing Register:	Dublin City Council
Homeless Register:	Dublin City Council
Application Date:	01/04/2005
First Experience of Homelessness:	Yes
Date of First Experience:	14/01/2005
Physical Disability:	Yes

You can come back later and add any information that you do not know when first creating a client record.

(parts 2 and 3 of this exercise continue on the next page)

(exercise continues from the previous page)

PRACTICE EXERCISE PART 2: Entering a Client Profile Form

Now that you've made Paula a client details form, you need to make a private form using the following information.

Citizenship:	Irish
Ethnic Origin:	White - Irish
Children Living Arrangements:	Some with client, some in care
Main Source of Income:	Lone parents

PRACTICE EXERCISE PART 3: Entering Actions

Enter the following actions that you have carried out on Paula's behalf.

First Action

Category:	Contact/Admission
Action/Outcome:	Client interviewed
Date:	(this day last week)
Notes:	None

Second Action

Category:	Care and case management
Action/Outcome:	Care plan agreed
Date:	(today's date)
Notes:	None

Enter a few more actions of your own choosing until you feel comfortable with this area of the database. Remember that this is where you will be doing most of your data entry.

When you have finished the above exercise, do the following exercises either in training or when you return to the office.

PRACTICE EXERCISE: Retrieving information

Find the Timothy Beckham record in LINK.

Where did he last stay?

____

How old is he?

____

PRACTICE EXERCISE: Entering a New Client

Enter a new client with the following information. Assume that he has given written consent to put his details on the database.

First name:	*Michael*
Surname:	*(make up a surname)*
Date of Birth:	*24/03/1980*
Gender:	*Male*
Family Status:	*Single only*
Homeless Status:	*Street*
Local Authority Area:	*Dublin City Council*
Contact at Other Services:	*Probation officer*

(practice exercise continues on next page)

(practice exercise continues from previous page)

First Experience of Homelessness:	*No*
Date of First Experience:	*14/01/2001*
Cause of Homelessness:	*Discharge from prison*
Physical Disability:	*Yes*

Now that you've made Michael a client details form, you need to make a private form using the following information.

Citizenship:	*Irish*
Ethnic Origin:	*White - Irish*
Children Living Arrangements:	*Some with client, some in care*
Main Source of Income:	*Disability*

Enter the following actions that you have carried out on Michael's behalf.

First Action

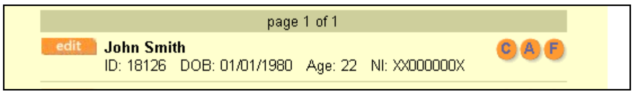
Category:	*Contact/Admission*
Action/Outcome:	*Client interviewed*
Date:	*(this day last week)*

Second Action

Category:	*Needs assessment*
Action/Outcome:	*Independent Living Skills Assessment*
Date:	*(today's date)*

Printing client information

To print the details about an individual, first find your client using **Find/Add**. He/she should appear something like this, where three orange buttons are visible:



TRAINER TIP Printers are not always available during training. In this case, ask trainees to choose Print Preview from the File menu instead of Print. When they have done this, they close this window by choosing either the Close button or the X in the top right corner.

Printing Client Details

- Click **C** button (to right of name)
- Choose **Print** from the **File** menu (on bar at the top of the screen)
- Choose the number of copies and click **Print** again
- Click **Back** (on bar at the top of the screen)

Printing Client Actions

- Click **A** button (to right of name)
- Note that **All Listed Projects** is selected. You can modify this if you want to see actions carried out by only certain agencies. To pick more than one agency, hold down the **Ctrl** key on your keyboard and click on the name of each one
- Note the **Start Date** and **End Date**. You can modify these if you want to print the actions carried out over a longer period of time.

  EXTRA KNOWLEDGE If trainees want to find out all actions ever entered for a client, they can put 01/01/2000 as the start date. This is because LINK has only been in operation since 2001.

- Click **Run Report**
- Choose **Print** from the **File** menu (on bar at the top of the screen)
- Choose the number of copies and click **Print** again
- Click **Back** twice (on bar at the top of the screen)

Printing a Client Profile Form

- Click **F** button (to right of name)
- Select the date of the **Client Profile Form** from the dropdown list
- Choose **Print** from the **File** menu (on bar at the top of the screen)
- Choose the number of copies and click **Print** again
- Click **Back** (on bar at the top of the screen)

PRACTICE EXERCISE – Printing Actions

Find Timothy Beckham in LINK.

Print out all the actions entered by All Listed Projects since LINK began in 2001.

Print out only the actions entered by the Information and Advice Services.

Print out only the actions entered by the Information and Advice Services and by the Settlement Services.

Passwords

- LINK passwords have 7-15 characters
- A password must consist of only numbers and letters, with a minimum of 2 numbers and 5 letters
- Passwords expire every 90 days
- LINK will lock you out of the system after 30 minutes of inactivity. You must click a button during this time; just entering text will not be sufficient.
- Your password will be disabled after three unsuccessful login attempts. If this happens, contact your project leader who will issue you with a new password. If you are a project leader, contact the LINK Coordinator at the Homeless Agency.

Responsibilities regarding passwords

- Never tell anybody your password
- Don't share client information with anyone not authorised to use LINK
- Log out of LINK before leaving
- Print only what you need & store client printouts in a secure filing system

Changing a password

TRAINER TIP It is time-consuming for a Project Leader (or, for Project Leader passwords, the Homeless Agency) to continually have to re-set expired passwords. It is essential to emphasise to trainees the importance of keeping their password up to date. You may like to suggest that they should keep a reminder somewhere (like a diary) of when their password needs to be renewed.

- Click **Change Password** (left hand side of screen)
- Enter your **Current Password**
- Enter your **New Password**. Your new password must be different from your current password.
- Enter your **New Password (again)**
- Click **Change Password**

This is the end of the course. Good luck and please be sure to fill out your evaluation form before you leave.

Also, remember to close LINK as follows:

Logging off

- Click **Logout** (left hand side of screen)
- Close Internet Explorer

Notes