



Training Manual

# How to Use LINK

## Introduction to the LINK Client Recording System

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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:

## 1 Overview

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

Effective searching.

## 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

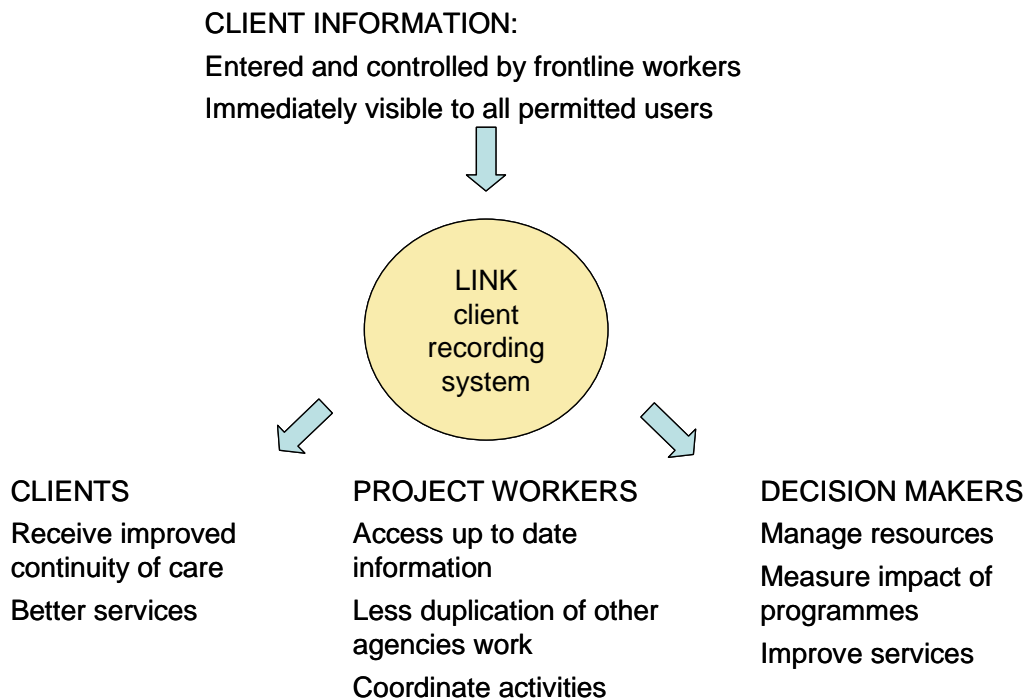
The role of passwords.  
Changing your password.

## 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.



## 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	Homeless Register
Date of Birth	Homeless Register Application Date
Age	Date of First Homelessness
Gender	First Experience of Homelessness?
Nickname	How Long Homeless
PPSN	Medical Card Details
Client ID	GP Contact Details
Family Status	Physical Disability
Local Authority Area	Training
Homeless Status	Have You Any Literacy Difficulties?
Have You Ever Slept Rough?	Are You Interested In Training? If Yes, What Kind?
If So, How Long	Education
Contact At Other Service	1st-2nd-3rd Causes/Risk Of Homelessness
Housing Register	<i>(LINK also records the name and agency of person entering the client)</i>

### Actions & Outcomes

Category (Type of Action)	Notes (shared with all LINK users)
Action/Outcome	Private Notes (shared with staff of own agency)
Date of Action	

### Client Profile Form

Ethnic Origin	Next of Kin
Citizenship	Children Living Arrangements
Native Language	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.		

Dublin Link  
are logged in as: Information Manager

**ADMIN**  
Staff

**CLIENT**  
Find/Add  
Advanced Search  
Last Client List  
My Clients

**Christie Driver**  
Consent: None - DUBTRN

ID: 8681   Gender: Male   Date of Birth: 01/01/1970   Age: 35

Client details   **Actions**   Client forms

**Enter a New Action**  
(Labels in **bold** indicate required information)

save

\*\*\* A written, verbal and exempt consent action must be entered to add the full range of actions. \*\*\*

# 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**
- 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

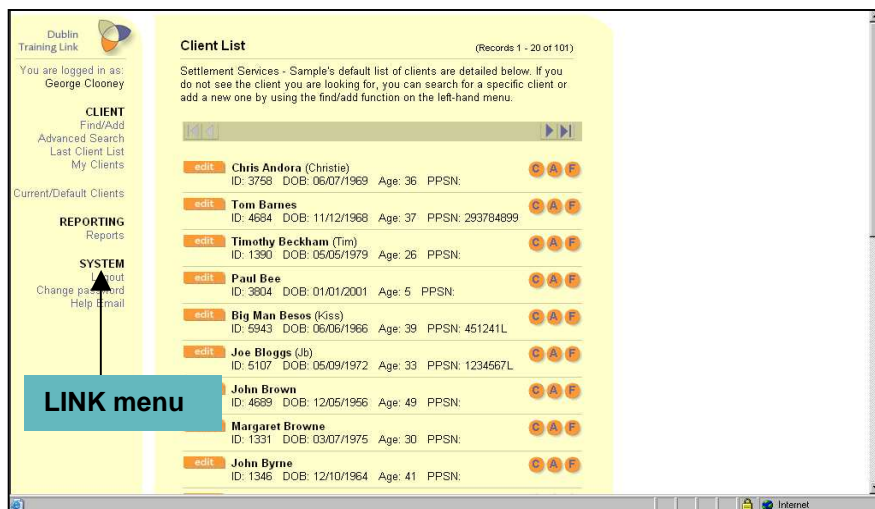
On your first visit to the LINK website, you can "save the website to Favorites". Then, on future visits you can simply pick LINK from the Favorites menu to open the site.

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)



## 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 be 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.

## 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:

- 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.

The screenshot displays the 'Enter a New Action' screen for client Marion Soap. The interface includes a sidebar with navigation options and a main content area with form fields and buttons.

**Client Information:** Marion Soap, Consent: None - DUBTRN, ID: 6002, Gender: Female, Date of Birth: 01/01/1964, Age: 42.

**Navigation:** Client details, **Actions**, Client forms

**Form Fields:**

- Action/Outcome: [Dropdown menu]
- Date: 23/04/2006 (dd/mm/yyyy)
- Staff Contact: Clooney, George [Dropdown menu]
- Notes: [Text area]

**Buttons:** save (top right), save (bottom center), Save (bottom center)

**Warning:** \*\*\* A written, verbal or exempt consent action must be entered to add the full range of actions.

**Radio Buttons:** Admission Actions (selected), Consent Actions

- Click **Consent**
- 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

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

***(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**

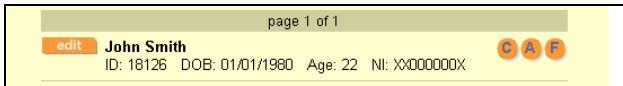
Category: *Contact/Admission*  
Action/Outcome: *Client interviewed*  
Date: *(this day last week)*

**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:



## 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.
- 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

- 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

