



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

Training Manual
Version 2.0

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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 on-line system help, which is provided as part of the system.

2.2. Support

The PASS System is co-ordinated by the Dublin Region Homeless Executive. In the event of any support requirements, please contact your Regional PASS Co-ordinator.

2.3. Data Protection

PASS was developed in conjunction with the Office of the Data Protection Commissioner (ODPC) and is fully compliant with the Data Protection Acts of 1988 & 2003.

Throughout the development phases of PASS, the ODPC provided feedback on PASS functionality and provided recommendations on functionality. Following implementation of these recommendations the ODPC confirmed PASS' compliance with the Data Protection Acts of 1988 & 2003.

2.3.1. Consent

In order to ensure adequate services are funded for people experiencing homelessness, it is critical that funders are aware of the nature and extent of homelessness.

The following basic information can be captured on PASS for all service users without consent:

- Name
- Date of Birth
- Gender
- Current Homeless Accommodation
- Outreach actions (in the event that the service user is not in homeless accommodation)

To capture further information the service user must provide explicit consent, verbal or written.

In the event that a service user does consent to PASS, this will not preclude the service user from accessing any services.

A PASS information leaflet, clearly outlining what PASS is and who sees information on PASS will be available for service users to read.

2.3.2. PPSN

Legislation regulating the use of the PPS No.¹

- The legislation governing the use of the PPS Number is contained in the Social Welfare (Consolidation) Act 2005, the Social Welfare Law Reform and Pension Act 2006, the Social Welfare and Pensions Act 2007, and Social Welfare and Pensions Act 2010.
- The PPS No. can be used *either* by the public bodies named in the above Social Welfare Acts (see www.welfare.ie for a full list of these bodies), *or* by any person or body authorised by these public bodies to act on their behalf.
- The PPS No. can also be used by any person who has a transaction (see definition below) with a public body e.g. an employer making Income Tax/PRSI returns on behalf of an employee.
- Under Social Welfare legislation the PPS No. **cannot** be used by the Defence Forces for anyone other than their own members.
The Immigration Act 2003 provides that the PPS No. can be used by An Garda Síochána in respect of non-EU nationals. An Garda Síochána **cannot** use the PPS No. for anyone else other than their own members.
- While the PPS No. can only be used by public bodies, equally it can only be used by such bodies for particular transactions as follows:
 - an application
 - a claim
 - a communication
 - a payment

or

 - a supply of a service

where the transaction relates to a public function of a public body.
- It is an offence for any person or body to request or hold a record of a PPS No. unless they are permitted by law to do so. [See Section 5.1 below](#). It is therefore the duty of all bodies to ensure that they are specified in law as being so entitled, *before* they request or hold a record of any person's PPS No.

To ensure PASS is compliant with legislation relating to the use of the PPSN, only bodies nominated by DSP have access to the PPSN on PASS. The PPSN is hidden for all PASS users within organisations that are not nominated bodies to have access to PPS numbers.

2.3.3. Information Recording and Access

A service user is entitled to view a copy of their PASS record at any time, and have this changed in the event of inaccuracies in information recording. As joint data controllers for PASS, voluntary and statutory homeless service providers must ensure that information recorded is accurate and factual.

¹ Personal Public Service Number Codes of Practice – Department of Social Protection.

2.3.4. Support Plan Security

The service user Support Plan assists in support the persons exit from homelessness and captures information under the following domains:

- Accommodation/Homelessness
- Family & Current Relationships
- Early Life Experience/Childhood
- Education
- Work & Job Training
- Legal Issues/Offending Behaviour
- Income & Finance
- General Physical Health
- Mental Health Issues
- Alcohol Use
- Drug Use
- Independent Living Skills

Owing to the sensitive nature of the information captured in the Support Plan, additional access rules are in place. Upon creation of a Support Plan, only the author and a manager within the service have access to the Support Plan.

In the event that an additional keyworker within homeless services begins working with the service user, the Support Plan author will then have the option for permitting access, full or restricted, to this keyworker.

This ensures the maximum level of security.

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

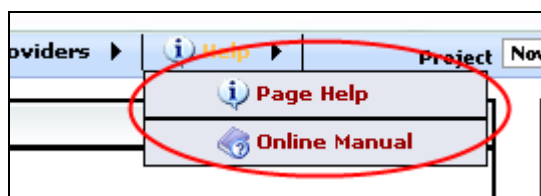
The URL to the Live PASS site is: <https://www.pass-system.ie>. Under no circumstances is test data to be entered on the Live site. Access to this site is strictly controlled by the PASS Co-ordinator and Project Managers.

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 on-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 PASS 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 reference data, user data, as well as having the ability to	<ul style="list-style-type: none"> • Manage Organisations/Projects/Users • Manage Reference Data • Manage All clients in all regions • View the system audit trail

Role Name	Description	Functions
	manage any client data within the system	
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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • Assign LPO users to project • Manage Bookings • Manage CPS Availability • Manage follow up assessment • Manage Client
System	The System Researcher can	<ul style="list-style-type: none"> • Create reports based on national

Role Name	Description	Functions
Researcher (SRES)	interrogate the national database and generate reports based on this. (Not covered in this training session)	data <ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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:

PASS Pathway Accommodation & Support System

Email Address:

Date of Birth: (ddmmyy)

Mothers Maiden Name:

Password:

[Forgot Password?](#)

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

Browser Status

- ✓ PASSED JAVASCRIPT OK: --Javascript was detected on your browser--
- ✓ PASSED SCREEN RESOLUTION OK: Screen Resolution was detected as at least 1024 X 768
- ✓ PASSED COOKIES OK: --Cookies are enabled--

If your browser failed any of the above tests it will affect your ability to use the PASS System. If you experience difficulties with browser settings, printing or exporting you should contact your local ICT helpdesk.

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. 11 th 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.

Logged in As: Majella Project Manager Role: PMG

Project: 10 Hillstreet

Clients

Client List | Manage Bookings | Manage Exclusions

PASS ID First Name Last Name Gender Date of Birth Filter Clients

--All-- My Region Search

PASS ID	Client	DOB	DOD
98	FirstName 98 LastName 98	05/12/1967	
102	FirstName 102 LastName 102	04/06/1971	
106	FirstName 106 LastName 106	21/06/1962	06/08/2012
123	FirstName 123 LastName 123	12/12/1974	07/08/2012
142	FirstName 142 LastName 142	23/11/1957	
145	FirstName 145 LastName 145	28/08/1976	
156	FirstName 156 LastName 156	01/01/1973	
160	FirstName 160 LastName 160	11/10/1993	
188	FirstName 188 LastName 188	14/03/1978	
190	FirstName 190 LastName 190	21/01/1976	

Page 1 of 100 (1000 items)

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

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:

Username	First Name	Surname	Project	Phone
wflanagan@openskydata.c	William	Flanagan	DCC - Homeless Services, Novas Hostel	1
testforanotherservice@tt.c	testfor	anotherseive	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

Page 1 of 3 (21 items) < 1 2 3 >

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:

	William Flanagan	01/12/2010								
	<table><tr><td>First Name:</td><td>Last Name:</td></tr><tr><td>William</td><td>Flanagan</td></tr><tr><td>Phone:</td><td>Email:</td></tr><tr><td>01 88559944</td><td>wflanagan@openskydata.com</td></tr></table>		First Name:	Last Name:	William	Flanagan	Phone:	Email:	01 88559944	wflanagan@openskydata.com
First Name:	Last Name:									
William	Flanagan									
Phone:	Email:									
01 88559944	wflanagan@openskydata.com									

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	<p>This option defaults to 'My Region', the system will automatically display the clients in the user's region</p> <p>If you input 'My Projects' in this dropdown, the search will be restricted to clients in your project only. This will be the default filter.</p> <p>If you input "All Clients" in this dropdown, the search criteria will be applied across all of the clients within the system.</p> <p>If you enter "My Clients" in this dropdown, the search will be restricted to clients that you have worked on in your project work.</p>

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

		PASS ID	Client	DOB	DOD
		98	FirstName 98 LastName 98	05/12/1967	
		102	FirstName 102 LastName 102	04/06/1971	
		106	FirstName 106 LastName 106	21/06/1962	06/08/2012
		123	FirstName 123 LastName 123	12/12/1974	07/08/2012
		142	FirstName 142 LastName 142	23/11/1957	
		145	FirstName 145 LastName 145	28/08/1976	
		156	FirstName 156 LastName 156	01/01/1973	
		160	FirstName 160 LastName 160	11/10/1993	
		188	FirstName 188 LastName 188	14/03/1978	
		190	FirstName 190 LastName 190	21/01/1976	

Note* - a new column is now displayed here called DOD – Date of Death. If a client has been marked as RIP then this date of death column will be populated.

On the left hand side of the search data-grid, there are a number of icons, which are 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.
	<p>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.</p> <p>This is discussed in greater detail later in this manual.</p>
	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 inform the client that you are moving their record to the current region. Note that the client record will no longer be visible in the previous region. Should the client not wish to have their record moved, you should create a new record for the client instead.
	<p>If you are a user that books/places clients into statutory/voluntary accommodation, you will see this icon next each client, and this will allow you to create Emergency Accommodation bookings for clients.</p> <p>This is discussed in greater detail later in this manual.</p>

5.1.1. Exercise

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

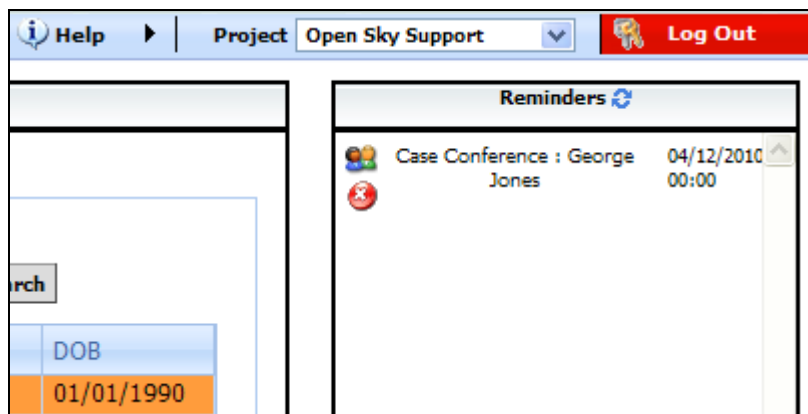
NOTES

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:

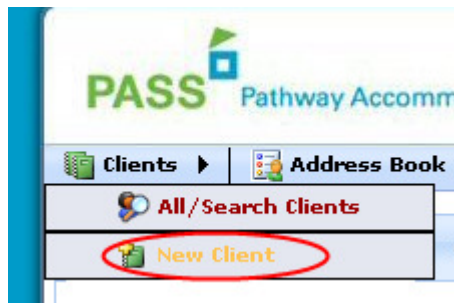


The icons are described as follows:

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, the Create Client button will not be displayed until after you perform the search.

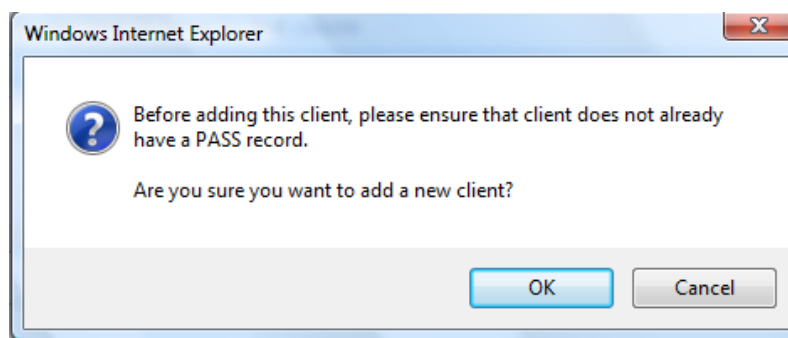
Enter the details of the Client whom you wish to add to the index. If the client already exists in the system, you will be shown the matching results:

The screenshot shows the 'Add/Edit Client Details' window. The 'Client Search' section has two input fields: 'First Name' (containing 'George') and 'Surname' (containing 'Jones'). There is a 'Search' button and a 'Create Client' button. Below the search fields is a table with the following headers: 'Id', 'Full Name', 'Date of Birth', and 'PPSN'. The table is empty, and the text 'No data to display' is shown below the table.

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:

The screenshot displays the PASS Pathway Accommodation & Support System interface. The top navigation bar includes links for Clients, Address Book, CPS Providers, and Help. Below this, a tabbed interface shows 'Client Details' as the active tab, with buttons for Edit and Refresh. The 'Client Details' tab is further divided into sub-tabs: Assessments, Keyworkers, Case Meeting, and Client. The 'Client' sub-tab is selected, showing the client's name as George Jones. The main content area displays the following details:

PASS Id:	First Name:
76	George
Last Name:	Gender:
Jones	Male
Date of Birth:	Consent:
11/10/1974	Consent Not Given

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. The system will not allow the user to add the same PPSN to multiple records.
Dep. Children Living With	Numeric (not mandatory)	The number of children living with the client – this is entered via the Child Dependents tab. This tab will be visible once the client details have been saved.
Not Living With	Numeric (not mandatory)	The number of the client's children not living with the client – as above, this will

	mandatory)	be entered via the Child Dependents tab
First Homelessness	Date (not mandatory)	The date the client first experienced homelessness
In receipt of medical card	Dropdown (mandatory)	Whether the client has a medical card
Medical Card Number	Text (mandatory for Yes option)	Medical card number, this is required if Yes has been selected to 'In receipt of medical card'. The medical card number must be unique, the system will not accept duplicates.
Expiry Date	Date (mandatory for Yes option)	Expiry date of Medical Card, this is required if Yes has been selected to 'In receipt of medical card'
Ethnic Origin	Dropdown (mandatory)	The client's ethnic origin
Formally resident in unde-18 state care	Checkbox (not mandatory)	Whether or not the client is Formally resident in under-18 state care
Citizenship	Dropdown (mandatory)	The client's citizenship
Country of Origin	Dropdown (mandatory)	The client's country of origin
Previous Accommodation	Dropdown (mandatory)	The client's accommodation type prior to entering homelessness
Household	Dropdown (mandatory)	The client's household type prior to entering homelessness
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:

Client: George Smith

Client Details **Assessments** **Keyworkers** **Case Meeting**

Details		Background		Homelessness Details	
PASS Id:	First Name:	PPSH:	Dep. Children Living with:	Accommodation:	Type:
50205	George	--Empty--	0	Cork Hostel, Main St, Cork	Emergency Accommodation
Last Name:	Genders:	Not Living with:	Medical Card:	Status:	StartDate:
Smith	Male	0	--Unknown--	Booked	17/08/2012
Date of Birth:	Date of Death:	Medical Card Number:	Expiry Date:	End Date:	First homelessness:
03/06/1984	--Not Set--	--Empty--	--Empty--	--Empty--	--Not Set--
Consent:		Ethnic Origin:	Citizenship:	Local Authority Area:	Last known address:
Verbal Consent Given		Traveller - Irish	Irish Citizen	Cork City Council	--Empty--
		Formerly resident in under-18 state care:	Country of Origin:	Reasons for Homelessness:	Previous Accommodation:
		No	Ireland	--Empty--	unknown

Actions / Case Notes **History** **Assessment** **Support Plan** **Emergency Accom.** **Long Term Accom.** **Keyworking Sessions** **Visit Support** **Linked Clients** **Child Dep.**

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	<p>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</p> <ul style="list-style-type: none"> Details (i.e. the minimum dataset details) Background Homelessness Details <p>Note that there is an 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.</p>
Assessments	<p>The Assessments tab contains detail on the various types of assessment carried out on the client, and includes the following:</p> <ul style="list-style-type: none"> Initial Assessment

	<ul style="list-style-type: none"> • 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
Assessments	A detailed history of all assessments (Initial, Housing Need & Holistic Needs) carried out against this client
Support Plan	The details of the client's support plan(s), including support plan needs, actions, and 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
Long Term Accommodation	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
Visiting Support	Allows the user to record details of Visiting Support (e.g. SLI) visits to clients who are currently resident in a Long Term Tenancy.
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
Child Dep.	This tab allows for recording child dependents such as the name, date of birth, gender of the child and if the child is living with the client or not.

To mark a client as deceased select the RIP button  on the client details screen

Client: George Jones  **Make Booking** 


 **Client Details**   

Details


PASS Id:	First Name:
54719	George
Last Name:	Gender:
Jones	Male
Date of Birth:	Date of Death:
01/01/1980	--Not Set--
Consent:	
Written Consent Given	



Selecting this option will display the following:

Add/Edit Client Details [Close]


 **Client RIP**

Date of Death



 **Save**  **Close**

Enter Date of Death and Save. DOD column on client results screen will now be updated with the date of death entered.

To undo an RIP select the Undo RIP option  on the client details screen (Note: this option is only displayed after an RIP has been recorded for the client)

The RIP feature is available to the Regional PASS Coordinator only. In the event that a client has passed away, please contact your Regional PASS Coordinator.

 **Client Details**




Details

PASS Id:	First Name:
54719	George
Last Name:	Gender:
Jones	Male
Date of Birth:	Date of Death:
01/01/1980	23/09/2012
Consent:	
Written Consent Given	

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

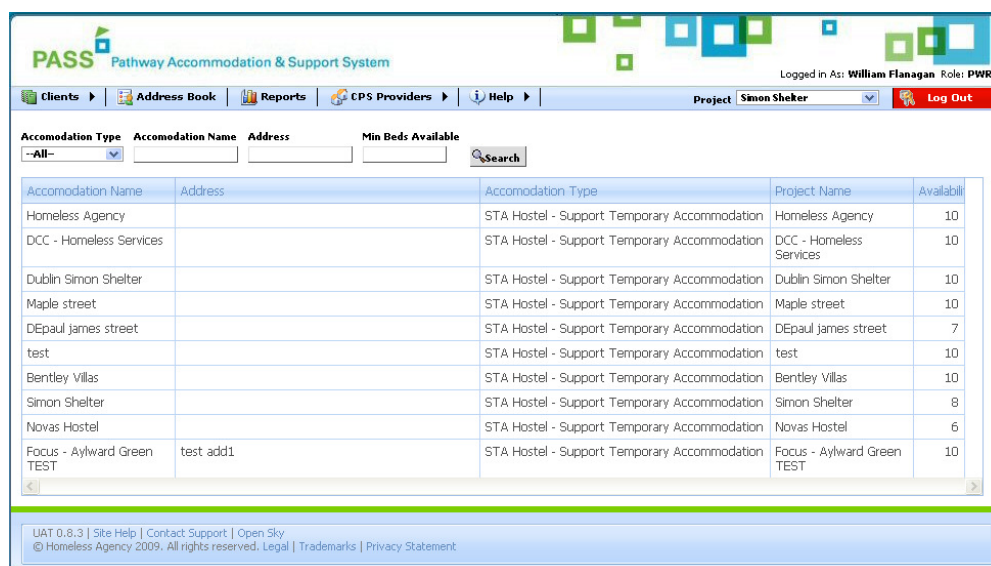
6. EMERGENCY ACCOMMODATION PROVIDERS (CPS)

PASS provides for full management of the emergency accommodation provision, also known on PASS as Centralised Placement Service (CPS), which caters for the placement of clients in Emergency Accommodation.

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 the current availability of Emergency Accommodation is for each one.



Accommodation Name	Address	Accommodation Type	Project Name	Availability
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 Local Authority User, you will also have the ability to manually update the "Availability" for each CPS provider. In this case, there will be an  icon next to the CPS Provider. Clicking this button brings up the following pop-up which allows you to modify the current availability:

Edit CPS Provider Details

Provider Details

Accommodation Name: Simon - Shelter Harcourt

Accommodation Type: STA Hostel Mixed - Support Temporary

Address 1: 27 Harcourt Street

Address 2: Dublin 2

Address 3:

Address 4:

View Units	No. of Beds:	Availability:
1	32	11

Landline: 01-475 9357

Mobile:

Save **Close**

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

To add/update units and number of beds select the View Units on the Edit CPS Provider Detail screen. The users can add/edit/remove units and number of beds per unit and also add/update the availability.

Manage Unit Details

Unit Details

#	Num	Name	Beds	Availability
Edit New	✖ 1	Unit 1	32	11

Close

Note: Typically the Local Authority 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 the Local Authority 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 Local Authority Operator, edit the availability for one of these CPS Providers.

NOTES

6.2. Manage CPS Bookings (Local Authority)

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

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

The screenshot shows the 'Manage Bookings' tab selected. Below the tabs are search filters for First Name, Last Name, Project, Date, and Status (set to 'All'). A 'Search' button is present. The main table lists bookings with the following data:

	Worker	Client	Project	No	Unit	Start Date	End Date	Confirmed D	Status
	Majella SA	FirstName 98 LastName 98	10 Hillstreet	1	Unit 1	05/09/2012		--Not Set--	Arrived
	Majella SA	Holly Smith	10 Hillstreet	1	Unit 1	03/09/2012		--Not Set--	Not Placed
	Majella SA	Ella Smith	10 Hillstreet	1	Unit 1	03/09/2012		--Not Set--	Not Placed
	Majella SA	Holly Smith	10 Hillstreet	1	Unit 1	03/09/2012		--Not Set--	Not Placed
	Majella SA	Emma Smith	10 Hillstreet	1	Unit 1	22/08/2012		--Not Set--	Not Placed

The following search criteria are available to filter the bookings:

The 'Status' dropdown menu is open, showing the following options: All, Booked, Arrived, Discharged, and Not Placed. A 'Search' button is visible to the right.

6.2.1. Exercise

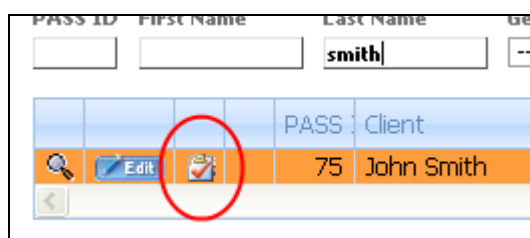
If you have the FPO/LAO role, go to the "Manage Bookings" tab and search for CPS bookings.

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:

The screenshot shows the 'Emergency Accommodation Details' dialog box. It contains the following fields and controls:

- Start Date:** A date picker field.
- Time:** A time input field showing '16:42'.
- CPS Provider:** A dropdown menu.
- Units:** A dropdown menu.
- Add Partner/Family to Booking:** A checkbox.
- Booking Extras:** A dropdown menu showing '--Select--'.
- Comments:** A text area.
- Buttons:** 'Save' and 'Close' buttons at the bottom.

On this screen, the FPO/LAO can select the date and time that the client is to be checked in, the CPS Provider, the unit to which the booking is made, add partner/family to booking and add any booking extras that may apply. The user can record any notes against this booking as is deemed appropriate.

When selecting the CPS provider, the drop down list will display the accommodation name, number of beds, address, type of accommodation, phone number and number of available units

CPS Provider:	Avoca House					
Units:	Name	Beds	Address	Type	Landline	Available Units
Add Partner/Family to Booking:	11 Eden Park	0	Eden Park, Sandycove	B&B - Men only	087-4156373	0
	11-13 Clanbrassil Street	3	11-13 Clanbrassil Street	B&B - Families, Single Women & Couples	not available	1
	11-13 Clonskeagh Road	7	11-13 Clonskeagh Road	B&B - Families, Single Women & Couples	2185716	1
Booking Extras:	155 Navan Road	0	155 Navan Road	B&B - Men only	8685777	0
	22 Trafalgar Terrace	7	22 Trafalgar Terrace	B&B - Women & Families	086-3581721	1
Comments:	23 New Cabra Road	1	23 New Cabra Road	B&B - Men only	0879563806	1
	272 S.C.R.	0	272 South Circular Road	B&B - Families, Single Women & Couples	4542183	0
	29 Phibsborough Road	0	29 Phibsborough Road	B&B - Men only	8500630	0
	3 Prince Edward Terrace	1	3 Prince Edward Terrace	B&B - Men only	087-2795368	1
	54-55 Mountjoy St	1	54-54 M54-55 Mountjoy St	B&B - Families, Single Women & Couples	8300074	1
	59 Camden St	12	59 Camden St	B&B - Non-Irish Singles		1
	Ardeevin	1	93 Main St, Swords	B&B - Men only	8405343	1
	Ardfert	3	1-3 Nelson St	B&B - Families, Single Women & Couples	8827570	1
	Avoca House	1410	Temple Street West	B&B - Families, Single Women & Couples	6799087	53
	Blackrock House	10	28 Newtown Ave	B&B - Women & Families	2109059	1
	Bolton House	0	38-39 Bolton Street	B&B - Men only	not available	0
	Brentwood House	0	Ballyboden Road	B&B - Men only	0863721845	0
	Carriglea House	23	18/18a Old Court Road	B&B - Non-Irish Singles	0877808676	1
	Catherine Gate	6	Parnell Road	B&B - Families, Single Women & Couples	087-6969644	1
	Clonliffe Road	8	208 Clonliffe Road	B&B - Non-Irish Singles	not available	1
	CLOSED - Crosscare - Charlemont	0	7-8 Charlemont Street, Dublin	TA Hostel Men - Temporary Accommodation	01-4750675	0
	Cold Weather Initiative - Chester	2		TA Hostel Mixed - Temporary Accommodation	1800707707	1
	Connolly Lodge	0	1-3 Buckingham St	B&B - Men only	8551546	0

Once the CPS provider is select then the Units drop down list is populated with applicable units for the selected CPS Provider. The user can then select which unit to book the client(s) into

Units:	Avoca - Unit 1			
Add Partner/Family to Booking:	Number	Name	Beds	Availability
Booking Extras:	1	Avoca - Unit 1	32	5
	2	Avoca - Unit 2	10	10
	3	3	3	3
	4	4	4	4
	5	5	5	5
	6	6	6	6
	7	7	7	7
	8	8	8	8
	9	9	9	9
	10	10	10	10
	11	11	11	11
	12	12	12	12
	13	13	13	13
	14	14	14	14
	15	15	15	15
	16	16	16	16
	17	17	17	17
	18	18	18	18
	19	19	19	19
	20	20	20	20
	20	20	20	20

If the enable auto checkout option is selected for this project, the Auto discharge checkbox will be displayed. This allows the person making the booking to select the date the client(s) will be discharged from the accommodation. If a date is selected the client(s) will automatically be discharged on the system.

Avoca - Unit 1

☒ **Auto Discharge**

On this date: 

To add Partner/Family to the booking select the drop down list. Both partner and dependent children will be now included in the booking and number of units/beds updated accordingly in the CPS availability.

Add Partner/Family to Booking: ☒

Family Details

Dependent Children:

☐ Lisa

☐ Lily

☐ Liam

☐ Larry




Partner:


☐ --Not Set--

The option of recording Pay assist option must be part of every booking, i.e. a new dropdown list which is manageable and presented to the user as part of the make booking option. The field will be called "booking extras".

Booking Extras:

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

Clients									
<div> <div>Client List</div> <div>Manage Bookings</div> <div>Manage Exclusions</div> </div>									
<div> <div>First Name</div> <div>Last Name</div> <div>Project</div> <div>Date</div> <div>Status</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div>All</div> <div> Search</div> </div>									
	Worker	Client	Project	No	Unit	Start Date	End Date	Confirmed D	Status
	Majella SA	FirstName 98 LastName 98	10 Hillstreet	1	Unit 1	05/09/2012		--Not Set--	Arrived

To make changes to an existing booking select the Mange Client's Booking 

To edit Client details select the Edit icon  Edit


To view Client Booking select the View Booking icon 

6.3.1. Exercise

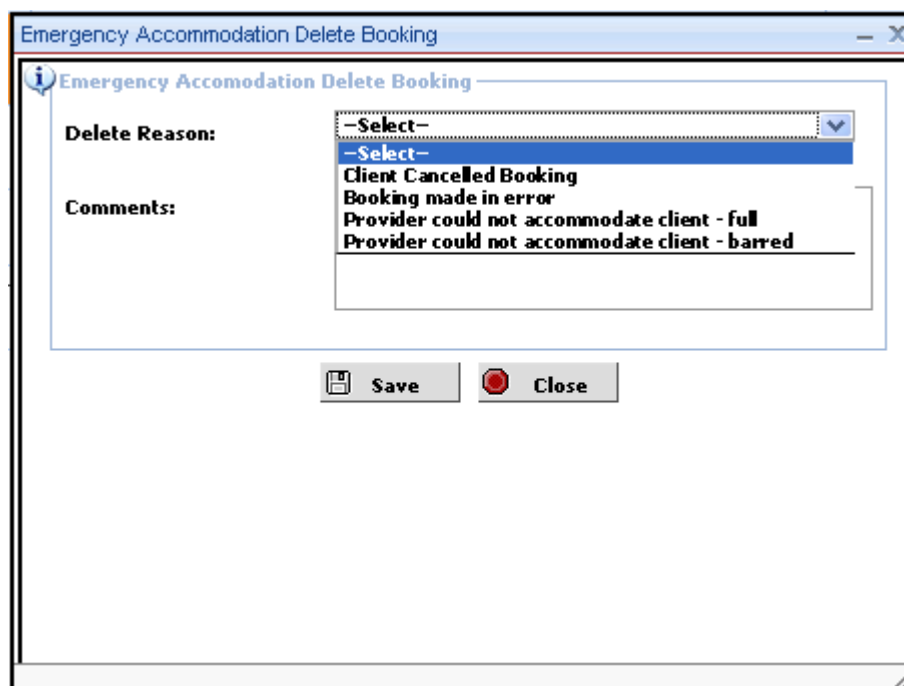
Do this exercise if you are an FPO/LAO user. For the client that you created in one of the earlier exercises, create a CPS Booking for that client from the client search panel.

NOTES

6.4. Cancelling a Booking

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:



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:

6.5. CLIENT NOT PLACED INTO EMERGENCY ACCOMMODATION

A new function to record clients not being placed has been added to the system. This is named 'Client not placed'. This will record when an accommodation cannot accommodate client(s) and also when client refused accommodation. The Not Placed icon is located beside the 'Make booking' button.

				54719	George Jones	01/01/1980
---	---	---	---	-------	--------------	------------

The 'Client Not placed' button  will open 'Client Not Placed into Emergency Accommodation' screen.

Saving these details will set the Status to 'Not Placed', the record is visible on both 'Manage Booking' list and Emergency Accommodation tab in the Client screen. Note here – the "not placed" status does not preclude the client from having a subsequent booking, or multiple "Client Not Placed" events, i.e. the "Client Not Placed" event is stand alone.

6.6. EXCLUSIONS & BARRINGS

To record a client being barred from an accommodation, select barred from the depart list, from long or short term accommodation. Once the discharge reason from an accommodation is set to barred then additional barring start & end dates are available.

If any barring was ever added for the Client there will be a new list added at the bottom of the Admit to Emergency Accommodation screen showing the barring history. Only current barrings are displayed. (These are displayed in order to inform the placement officer of the current barrings that exist in order to inform the placement process)

Emergency Accommodation Details

Emergency Accommodation Check-in

Start Date: 17/10/2012 Time: 14:47

CPS Provider: 10 Hillstreet
Saving will automatically confirm the arrival at this provider.

Units: Unit 1

☐ Auto Discharge

Add Partner/Family to Booking: ☐

Booking Extras: --Select--

Comments:

Barrings

Provider	Start Date	End Date
Cork Hostel	17/10/2012	24/10/2012

The Exclusions tab (beside Manage Bookings) displays all barrings for short and long term accommodation. The user can search this list of barrings by First Name, Last Name and Provider

Clients

Client List **Manage Bookings** **Manage Exclusions**

First Name Last Name Provider

	Client	Provider	Exclusion	Barred From	Barred To
<input type="button" value="Edit"/> <input type="button" value="X"/>	Fname 188 Lname 188	Crosscare - Bentley House	Barred - between one month and six months	07/10/2012	08/10/2012
<input type="button" value="Edit"/> <input type="button" value="X"/>	Fname 190 Lname 190	Colm Accom Test 2	Barred - between one week and one month	09/10/2012	17/10/2012
<input type="button" value="Edit"/> <input type="button" value="X"/>	Fname 583 Lname 583	10 Hillstreet	Barred - between one week and one month	08/10/2012	07/10/2012
<input type="button" value="Edit"/> <input type="button" value="X"/>	George Smith	Cork Hostel	Barred - one week or less	17/10/2012	24/10/2012

The user can both edit and delete these barrings.

View/Edit Exclusion Details

Exclusion Details

Exclusion: Barred - one week or less

Barring Start Date: 17/10/2012

Barring End Date: 24/10/2012

Save Close

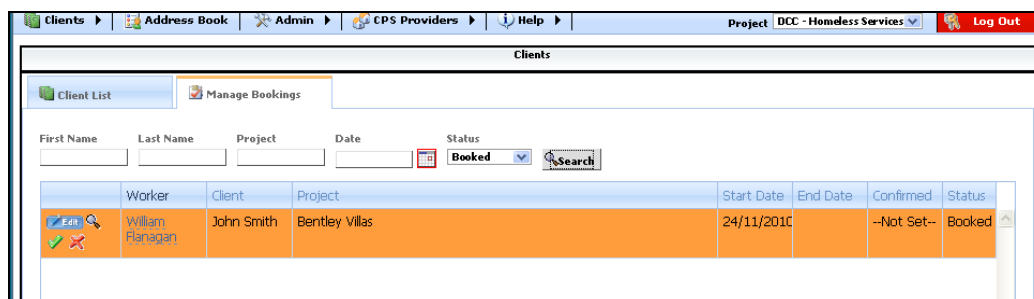
6.6.1. Exercise


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

NOTES

6.7. Confirming a Booking (by the Accommodation Provider)

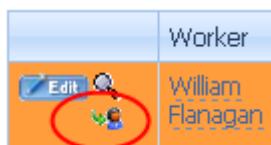
It is crucial that the Accommodation Providers confirm the arrival of clients at their emergency accommodation. To do this, the Project Worker for the emergency accommodation should log in to PASS and then view their Manage Bookings tab on the Client Search screen, as shown below:



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).

6.7.1. Exercise

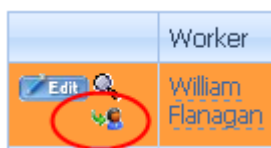
Do this exercise if you are an FPO/LAO user. For the booking that you created in one of the previous exercise, confirm the client's arrival at the CPS Emergency Accommodation.

NOTES

6.8. 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).

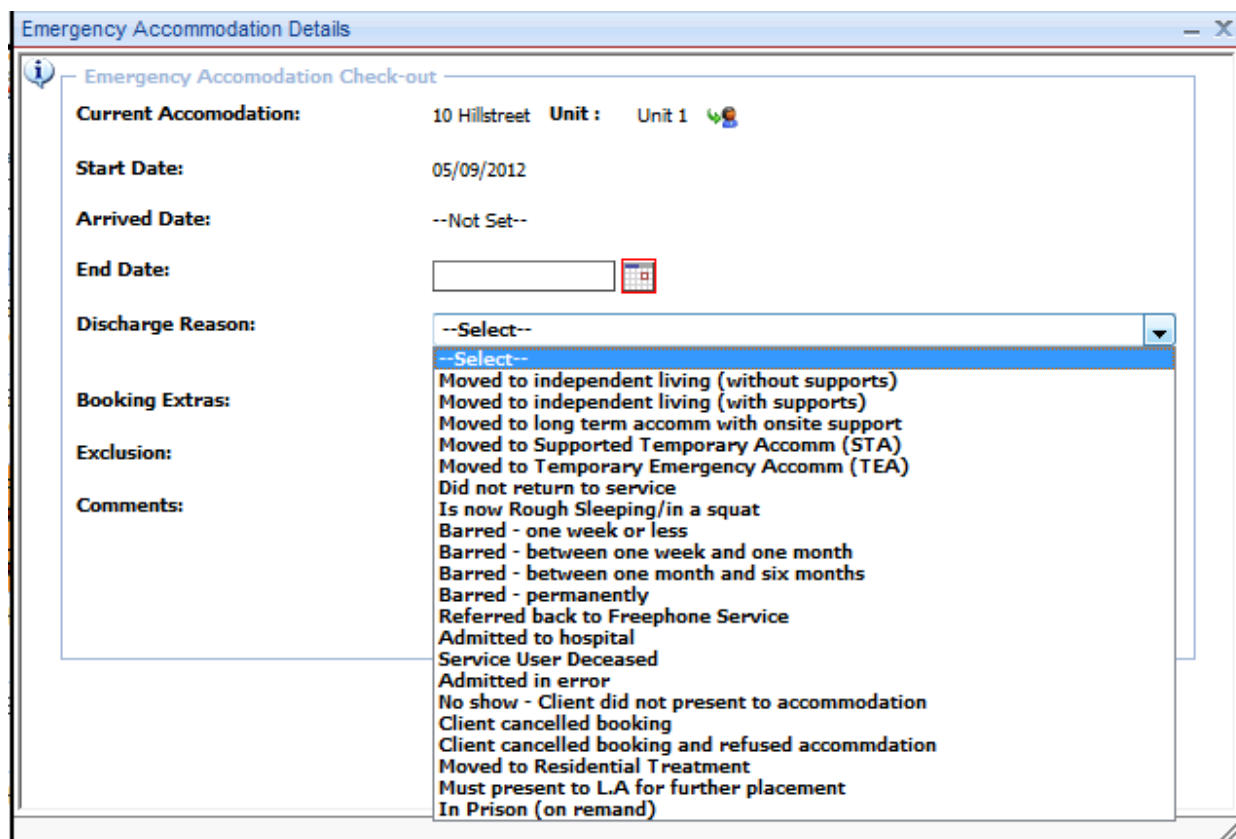
6.8.1. Exercise

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

NOTES


6.9. 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:




Emergency Accommodation Details

Emergency Accommodation Check-out

Current Accommodation: 10 Hillstreet **Unit :** Unit 1 

Start Date: 05/09/2012

Arrived Date: --Not Set--

End Date: 

Discharge Reason: --Select--

Booking Extras:

Exclusion:

Comments:

--Select--

- Moved to independent living (without supports)
- Moved to independent living (with supports)
- Moved to long term accomm with onsite support
- Moved to Supported Temporary Accommm (STA)
- Moved to Temporary Emergency Accommm (TEA)
- Did not return to service
- Is now Rough Sleeping/in a squat
- Barred - one week or less
- Barred - between one week and one month
- Barred - between one month and six months
- Barred - permanently
- Referred back to Freephone Service
- Admitted to hospital
- Service User Deceased
- Admitted in error
- No show - Client did not present to accommodation
- Client cancelled booking
- Client cancelled booking and refused accommdation
- Moved to Residential Treatment
- Must present to L.A for further placement
- In Prison (on remand)

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.

6.9.1. 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:

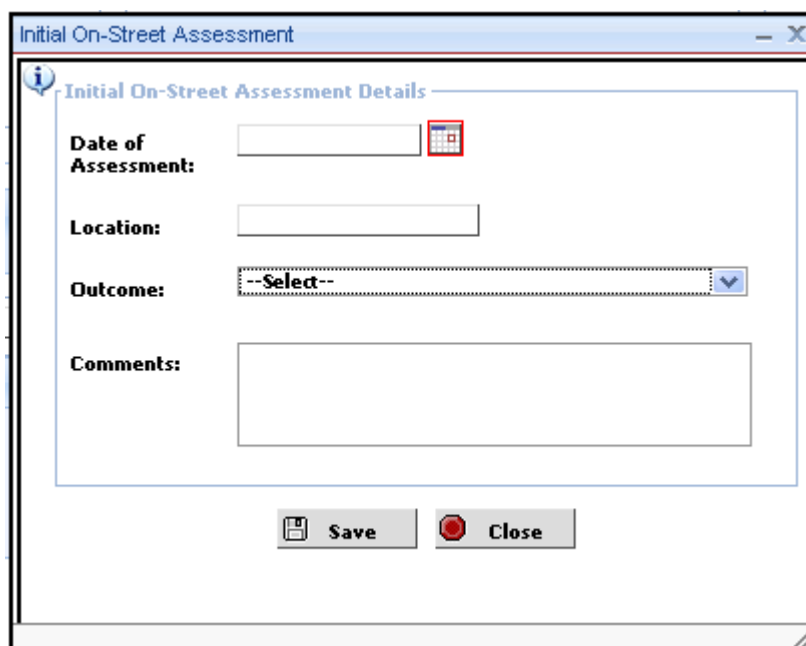
- Initial Assessment
- Assessment of Housing Needs
- Holistic Needs Assessment (discussed in a later section)

7.1. Initial Assessment

The Initial On-Street Assessment will primarily be recorded by the 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:



The dialog box is titled "Initial On-Street Assessment" and contains the following fields:

- Date of Assessment:** A text box with a calendar icon to its right.
- Location:** A text box.
- Outcome:** A dropdown menu with "--Select--" as the current selection.
- Comments:** A large text area for notes.

At the bottom of the dialog are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red circle icon).

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)	<p>A list of possible outcomes of the assessment, possible values may include:</p> <ul style="list-style-type: none"> • 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.

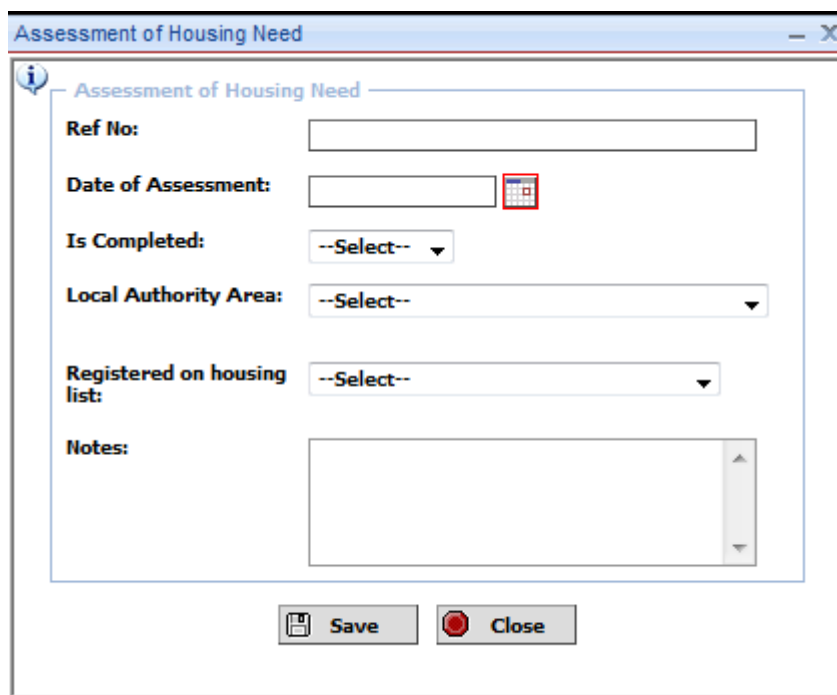
NOTES

7.2. Assessment of Housing Need

The Assessment of Housing Need (also known 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
Ref No	Text (not mandatory)	Reference number for the Assessment of Housing Need
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)	<p>The status of the client's registration on the Local Authority's housing list. Possible values include:</p> <ul style="list-style-type: none"> • Accepted with Homeless Priority • Accepted without Homeless Priority • Rejected • Processing
Notes	Text (not mandatory)	Notes section to add comments

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)

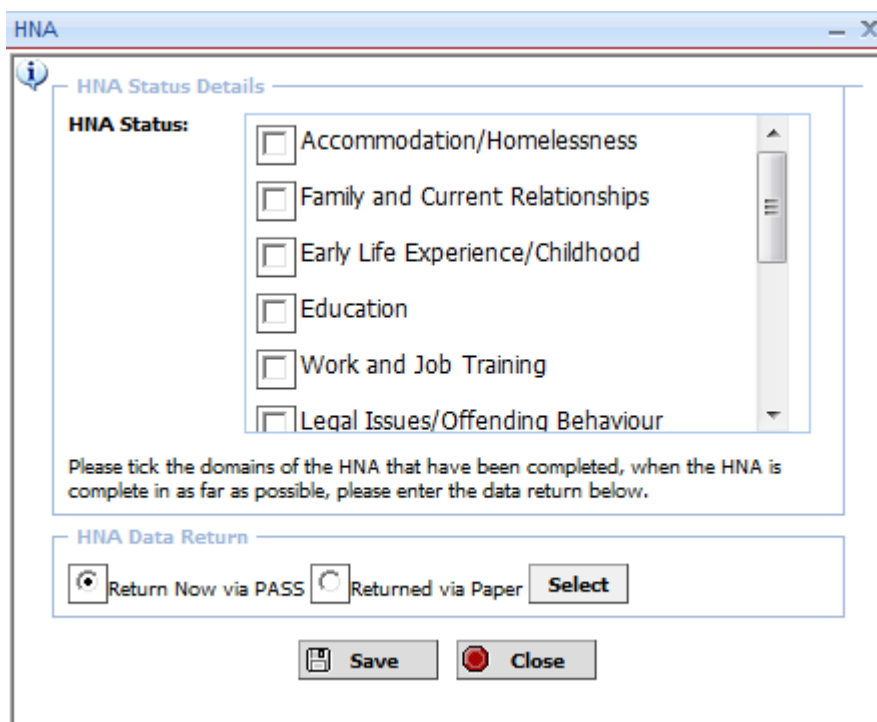
The Holistic Needs Assessment (HNA) is entered by a project worker/manager. Due to the extremely sensitive nature of the HNA data, the volume of the HNA and its once off completion, the user will only record the fact that HNA Domains have been completed for a client. This will allow other system users 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:



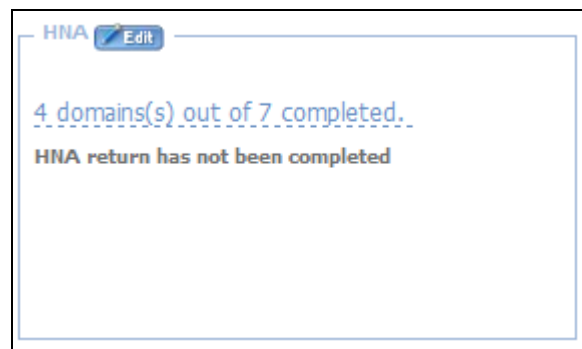
Note: Client Consent must first have been recorded for this before this Assessment can be accessed.

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.

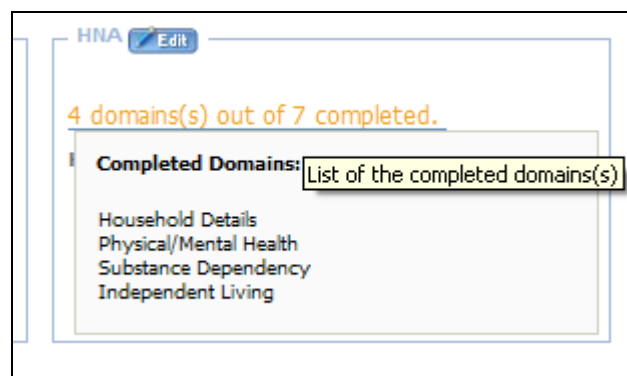
As shown above, the HNA status is broken down into a series of domains, and the user should record the domains that have been completed in the above dialog.

Field	Field Type	Description
HNA Status	Multi-select (not mandatory)	<p>The HNA status is broken down in to a series of domains, possible values for this field include:</p> <ul style="list-style-type: none"> • 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:



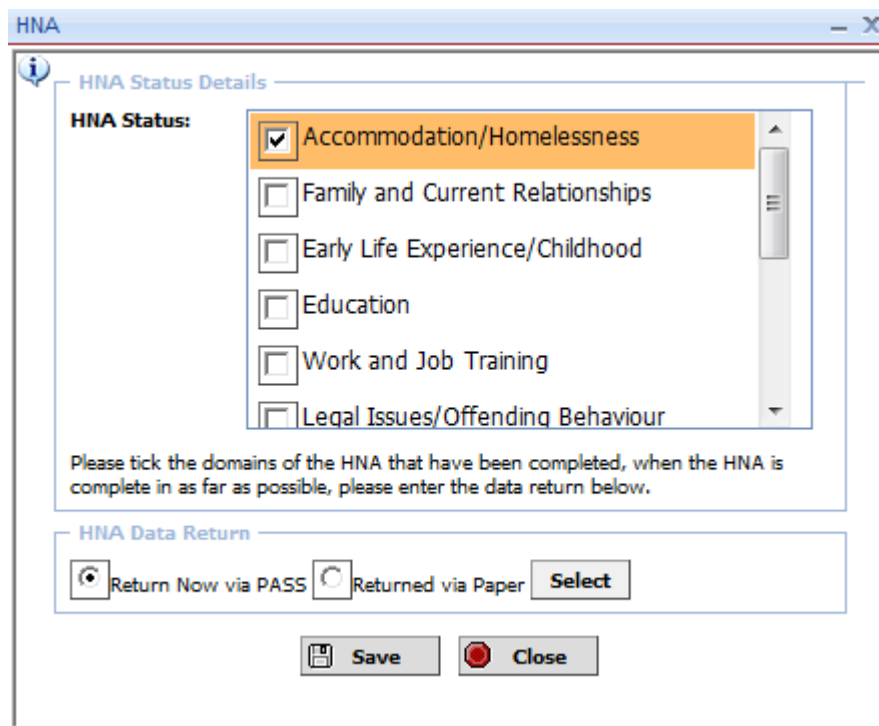
8.1.1. Exercise

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.

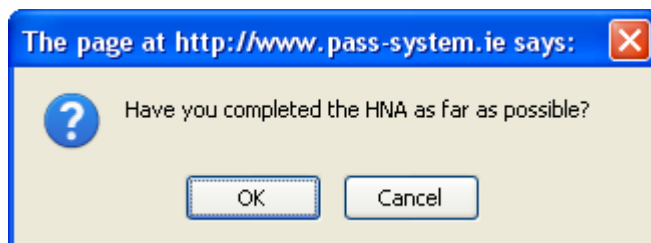
NOTES

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:

The screenshot shows a web-based form titled "HNA Return" with a "Client:" field. The main heading is "Step 1 of 9: Household Details". Below this is a section titled "Household Details".

Under "Household Details", there is a "Status" label followed by six radio button options:

- ☐ Single Person
- ☒ Single with child(ren) living with him/her
- ☐ Single with child(ren) not living with him/her
- ☐ Couple (No Children)
- ☐ Couple with child(ren) living with them
- ☐ Couple with child(ren) not living with them

Below the status options is a label "Number of Dependent children" followed by a dropdown menu showing the number "2".

At the bottom of the form is a "Next" button.

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:

[What is a Keyworker?](#) [What is a Case Manager?](#)

Remove Key Worker Role
Assume Case Manager Role

Id	Full Name	Projects	Relation
1	H.A. User	Homeless Agency, Open Sky Support, Bentley Villas	Key Worker

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:


Create New			
	Date	Description	Created By
Edit	04/12/2010	Meeting to review client's educational progress	H.A. User

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
<input checked="" type="checkbox"/>	testfor	anotherseive	DEpaul james street
<input type="checkbox"/>	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
<input type="checkbox"/>	H.A.	User	Homeless Agency, Open Sky Support, Bentley Villas
<input type="checkbox"/>	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
<input type="checkbox"/>	Regional	SuperAdmin	DCC - Homeless Services
<input type="checkbox"/>	pwr	pwr	Oak House
<input type="checkbox"/>	Project	Worker	Focus Ireland Emergency, DEpaul james street
<input type="checkbox"/>	pro	worker	DEpaul james street
<input type="checkbox"/>	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.

Note, the System Administrator can now delete Case Notes if required.

Case Note can now be printed, select the Print List icon **Print List**


The following screen will be displayed:

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: <ul style="list-style-type: none"> • 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
Outcome	Dropdown (mandatory)	The outcome field displays a list of possible outcomes for the case note
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 information:	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.

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:

Actions / se Notes	History	Assessment	Support Plan	Emergency Accommodation	Housing
<div> Date <input type="text"/> Recorded By <input type="text"/> Comments <input type="text"/> Search </div>					
	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		
Page 1 of 3 (21 items) 1					

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:

View Support Plan

Details

Date of support plan:

Select Manager:

Risk Monitoring Questions

Is there evidence to suggest that this person is a risk to him/herself? ☐ Yes ☒ No

Risk to self may include self-harm, suicidal thoughts, vulnerability to abuse, hazardous alcohol/drug use etc

Is there evidence to suggest that this person is a risk to others? ☐ Yes ☒ No

Risk to self may include: previous convictions for arson, firearms / weapons offences, grievous bodily harm, violent / aggressive behaviour, sexual offences, offences against children, etc.

Are you aware of any circumstances or events that would trigger a risk with this service user? ☐ Yes ☒ No

Triggers may include non-compliance with medication, alcohol or drug use, contact with or separation from certain individuals, anniversaries/times of the year, etc.

Known risks triggers brought to the attention of

Reporting Person Name:

Job title/role:

Date:



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 Questions	3 x Radio Buttons(mandatory)	A set of questions relating to the client's risk monitoring status
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.

Print the Support by selecting the print icon  |


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 Export
 


Support Plan Details

Client Id:

Client Name:

Date of support plan:

Manager:

	Yes	No
--	-----	----

Risk to self may include self-harm, suicidal thoughts, vulnerability to abuse, hazardous alcohol/drug use etc

	Yes	No
--	-----	----

Risk to self may include: previous convictions for arson, firearms / weapons offences, grievous bodily harm, violent / aggressive behaviour, sexual offences, offences against children, etc.

	Yes	No
--	-----	----

Triggers may include non-compliance with medication, alcohol or drug use, contact with or separation from certain individuals, anniversaries/times of the year, etc.

Reporting Person Name:

Job title/role:

Date:

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.

Print Support Needs by selecting the print icon  |

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 screenshot shows a web application window titled "View Support Plan Action". Inside, there is a tab labeled "Action Details". The form contains the following fields and controls:

- Date:** A text box containing "01/12/2010" with a calendar icon to its right.
- Support Area:** A dropdown menu currently showing "Accommodation / Homelessness".
- Planned Outcome:** A dropdown menu currently showing "Access transitional accommodation".
- Action taken:** A large empty text box.
- Person or Organisation Responsible:** An empty text box.
- Target Date:** An empty text box with a calendar icon to its right.
- Outcome date:** An empty text box with a calendar icon to its right.
- Outcome:** A large empty text box.

At the bottom of the window, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red circle icon).

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 Responsible	Text (not mandatory)	The name of a person or organisation that is responsible for 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

Print the Support Plan Actions by selecting the print icon  |

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 screenshot shows a window titled "View Support Plan Review". Inside, there is a section titled "Review Details" with an information icon. The form contains the following fields and values:


- Review Date:** 01/12/2010 (with a calendar icon)
- Next Scheduled Review Date:** 16/02/2011 (with a calendar icon)
- Frequency of review:** 6 weeks
- Progress to date:** Good progress on ECDL training course.
- Objectives for next support plan:** Gain a place on a back to work scheme.
- Outcomes for current actions:** Satisfactory
- Comments:** Clients requires further motivation.

At the bottom of the window, there are two buttons: "Save" (with a floppy disk icon) and "Close" (with a red circle icon).

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

Print Support Plan Reviews by selecting the print icon 

1 of 1
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Select a format
Export

Support Plan Reviews

Client Id: 54694 Client Name: Emma Smith

Review Date	Next Review Date	Frequency	Progress To Date	Objectives For Next Plan	Outcomes For Current Action	Comments
21/08/2012	28/08/2012	Weekly	Client has started attending ECDL course and is preparing for exam next month	Complete ECDL exam and start reviewing other courses to help gain employment	Client is doing well in ECDL course and is enthusiastic about passing the exams	Happy with progress to date.

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:

Start Date End Date Provider Created By Status

Client Not Placed

	Start Date	End Date	Provider	Unit N	Unit Name	Created By	Type/Status
	20/09/2012		10 Hillstreet	1	Unit 1	Majella SA / 10 Hillstreet	Not Placed
	20/09/2012		10 Hillstreet	1	Unit 1	Majella SA / 10 Hillstreet	Not Placed
	20/09/2012	20/09/2012	10 Hillstreet	1	Unit 1	Majella SA / 10 Hillstreet	Discharged
	19/09/2012	20/09/2012	DCC - Maple House	1	Unit 1	Majella SA / 10 Hillstreet	Discharged

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

Note the System Administrator can delete an Emergency Accommodation Record if required.

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:

Start Date	<input type="text"/>	End Date	<input type="text"/>	Provider	<input type="text"/>	Created By	<input type="text"/>	Status	All	<input type="button" value="Search"/>
<input type="button" value="Admit to Long Term/Create Tenancy"/>				<input type="button" value="Depart/End Tenancy"/>						
<input type="button" value="Edit"/>	Start Date	End Date	Provider/Landlord		Created By		Type/Status			
<input type="button" value="X"/>	23/09/2012		Private Landlord		Majella SA / 10 Hillstreet		Visiting Support - SLI			

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

Note the System Administrator can delete a Long Term Accommodation record

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
Written Tenancy Issued	Checkbox (not mandatory)	Has a written tenancy been issued to the client
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:

Date	<input type="text"/>	Text	<input type="text"/>	Created By	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Create Session"/>	<input type="button" value="Print List"/>
	Start Time	Location	Duration	Public	Created By			
<input type="button" value="Edit"/>	23/09/2012 00:00	DCC	1 hrs 0 mins	False	Majella SA / 10 Hillstreet			<input type="button" value="X"/>

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

Print Keyworking Sessions by selecting the print list icon

1 of 1	100%	Find Next	Select a format	Export	<input type="button" value="Print"/>
Keyworking Sessions					
Client Id: 50205	Client Name: George Smith				
Start Time	Location	Duration	Is Public	Created By	Description
01/10/2012 00:00	DCC	1 hrs 0 mins	False	H.A. User	Discussed VEC grants with client and how to apply for one. Discussed possible training courses for the client. Also advised on writing up CV and cover letter. Agreed to meet client next week to help with this
08/10/2012 00:00	DCC	1 hrs 0 mins	False	H.A. User	Assisted client writing up CV and cover letter. Gave advice on how to look for jobs on websites and local areas.

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.

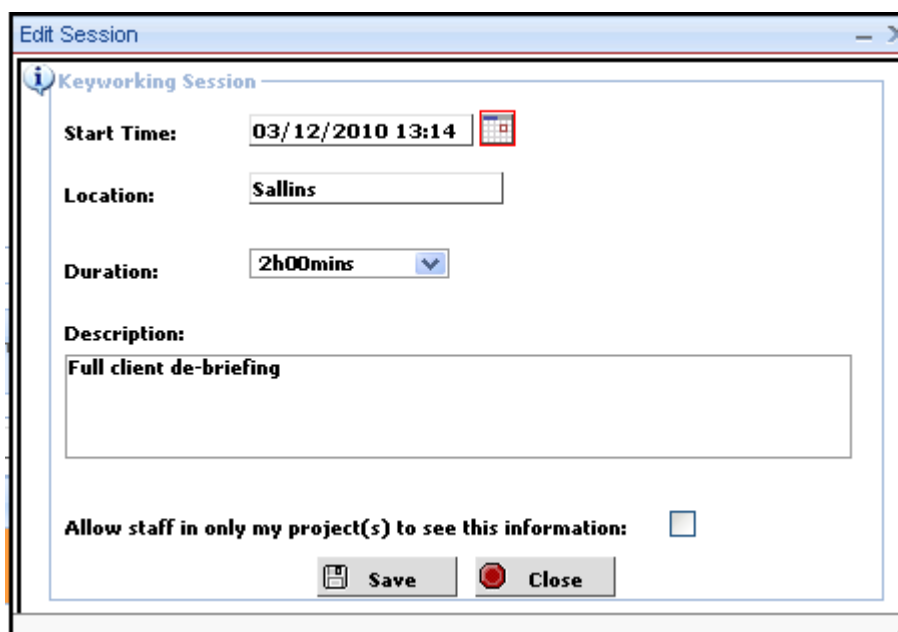
NOTES

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

 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	
	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  icon next to the Link in question.

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

Create Linked Client

Relationship Details

Linked Client

Firstname --Not Set--

Lastname --Not Set--

First Homeless --Not Set--

Last Address --Not Set--

Select a Client

Relationship --Select--

Is Next of Kin ☐

Save **Close**

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

Create Linked Client

Select a Client from the List

PASS ID **First Name** **Last Name** **Date Of Birth**

Filter Clients My Region

Search

	Firstname	Lastname	DOB
✓	FirstName 98	LastName 98	05/12/1967
✓	FirstName 102	LastName 102	04/06/1971
✓	FirstName 106	LastName 106	21/06/1962
✓	FirstName 123	LastName 123	12/12/1974
✓	FirstName 142	LastName 142	23/11/1957

Page 1 of 200 (1000 items) 1 2 3 4 5 6 7 ... 198 199 200

Close

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:

The screenshot shows a software interface with a top navigation bar containing tabs: Actions / Case Notes, History, Assessment, Support Plan, Emergency Accom., Long Term Accom., Keyworking Sessions, Visiting Support (highlighted), Linked Clients, and Child Dep. Below the tabs is a search area with fields for Date, Project, Worker, and Type (set to All), a Search button, and an End Opened Support button. Below the search area is a table with the following data:

	Phase Status	Worker	Date Opened	Date Closed	Type
	Open	H.A. User / Open Sky Support	01/10/2012	31/10/2012	Visiting-Short to med.term, low to mod. intensity

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 dealt 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:

The screenshot shows a dialog box titled "Initiate Support Phase". It contains the following fields and controls:

- Start Date:** 03/12/2010 (with a calendar icon)
- End Date:** 03/12/2011 (with a calendar icon)
- Support Type:** Visiting-Short to med.term, mod. to high intensi (dropdown menu)
- Comments:** A text area containing the text "Going to visit client every thursday"
- Buttons:** Save and Close

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 screenshot shows a 'Create Visit' window. It has a title bar with 'Create Visit' and standard window controls. Below the title bar is a tab labeled 'Session Details'. The form contains the following fields:

- Visit Date:** A text box containing '24/10/2013' with a calendar icon to its right.
- Support Type:** A dropdown menu showing '--Select--'.
- Visit Action:** A dropdown menu showing '--Select--'.
- Duration:** A dropdown menu showing '--Select--'.
- Comments:** A large text area for entering comments.

At the bottom of the window are two buttons: 'Save' (with a floppy disk icon) and 'Close' (with a red circle icon).

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.
Visit Action	Dropdown (mandatory)	The action undertaken during this visit
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

18.4. Child Dependents

In order to add/view child dependent details for the client, you must navigate to the "Child Dep." tab on the LOWER part of the client page.

You will be presented with the following dialog which shows any existing child dependent details for this client, as shown below:

Actions / Case Notes

History

Assessment

Support Plan

Emergency Accomm.

Long Term Accomm.



Keyworking Sessions


Visit. Support

Linked Clients

Child Dep.

Create Child Dependent

	Name	Date of Birth	Gender	Is Living with Client
 	Holly	04/07/2011	Female	<input checked="" type="checkbox"/>

To add a new Child Dependent, simply click the "Create Child Dependent" button on the top centre of the Child Dep tab. Alternatively, you can edit an existing child dependent by clicking on the  Edit icon next to the dependent 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
Name	Text(mandatory)	The name of the child
Date of Birth	Date (mandatory)	The child's date of birth
Gender	Dropdown (mandatory)	Dropdown containing male/female
Is living with client	Checkbox (not mandatory)	Is the child currently living with the client

For one of the clients created in a previous exercise, browse to the Child Dep. tab and create a new child dependent record for the client.

NOTES

19. EDIT PROJECTS (PMG 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:

- Projects

Add Project					10 per page ▼
	Name	Organisation	Emerg. Accom.	Visiting Supp.	PPSN Viewable
	10 Hillstreet	Private Landlord (B&B)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	11 Eden Park	Private Landlord (B&B)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	11-13 Clanbrassil Street	Private Landlord (B&B)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

View/Edit Project Details

Project
10 Hillstreet

Organisation
Private Landlord (B&B)

Project Type
B&B - Families, Single Wome

Provides Visiting Support
☒

PPSN Viewable
☒

PASS SLA funded project
☐

Local Authority
Kildare County Council

Address 1:
10 Hillstreet

Address 2:

Address 3:

Address 4:

Landline:
8730122

Mobile:

☒ **Provides Emergency Accommodation**

[View Units](#)

No.	Units	No. of Beds	Availability
1		38	11

Enable Auto Checkout
☒

Checkout Time
08:00H

Regions
Greater Dublin

Users
SA Test2
Majella SA
Majella LAOM
Majella RSA
Majella Project Worker
Majella Project Manager

Buttons: Remove, Add, Save, Delete, Cancel

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
Project Type	Dropdown (mandatory)	The type of project i.e. SLA, ETA, PEA
Provides Visiting Support	Checkbox	Does this project provide visiting support
PPSN Viewable	Checkbox	

PASS SLA Funded	Checkbox	Is this project funded by PASS
Local Authority	Multi Select	The local authority the project belongs to
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	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
Username	Firstname	Surname	Projects	Role	Last Logon
 wflanagan@openskydata.c	William	Flanagan	DCC - Homeless Services, Novas Hostel	PMG	03/12/2010 13:28:45
 pmg@dublincity.ie	Project	Manager	DEpaul james street, Simon Shelter, Novas Hostel	PMG	04/11/2010 10:24:50
 lao@dublincity.ie	Local	Authority	DCC - Homeless Services	LAO	12/08/2010 16:56:48
 homelesssservices@dublincit	Local	Authority	DCC - Homeless Services	LAO	
 freephonetest2@dublincity	Freephone	Test2	DCC - Homeless Services	FPO	12/08/2010 12:04:23
 freephonemanager@dublir	Freephone	Manager	DCC - Homeless Services	FPOM	12/08/2010 11:59:13
 freephone@dublincity.ie	Freephone	Operator	DCC - Homeless Services	FPO,SRES	08/10/2010 09:40:35
 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:

View/Edit User Details

User

Email
wflanagan@openskydata.com

Date of Birth (ddmmyy)
111074

Firstname
William

Surname
Flanagan

Mothers Maiden Name
m

Contact Phone No.
01 88559944

Projects
DCC - Homeless Services
*Novas Hostel

Remove
Add
Set Default(*)

Role
PMG
PWR
FPOM
LAOM
FPO
LAO
SPCS

Password
☒ Leave unchanged
☐ Force password reset after their next login.
☐ Reset the password to the system default.

Last Logon
03/12/2010 13:28:45

Invalid Attempts (Max is 3)
0

Save **Delete** **Cancel**

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 login 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: <ul style="list-style-type: none"> • 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 invalid 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 locked. 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. NOTES
