



An Initiative of
**Government
of South Australia**



human
services

homeless²HOME

USER GUIDE

Assistance with H2H

Users who need help with H2H should first check the relevant section of this guide, read through the supporting documentation on the support page (by clicking the H2H support link at the bottom of every page of H2H), or ask a co-worker, or manager.

For assistance with training related enquiries, contact the H2H Systems Support and Education team on **1800 292 979** or email h2h@sa.gov.au

Note: *all client examples contained in this user guide are fictional and not based on any true client information. Any similarity to true client records is coincidental.*

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INTRODUCTION

About the Homeless2Home system

The Homeless2Home Client & Case Management System (H2H) is a web-based application released as part of South Australia's implementation of the National Partnership Agreement on Homelessness (NPAH) in 2011.

H2H was developed to provide a single, state- wide, case management and information management system. H2H benefits both clients and agencies by:

- Enabling clients to access assistance through any agency so there is no wrong door
- Ensuring clients only tell their story once
- Creating easier entry and referral pathway into the support sector for clients
- Reducing the reporting burden for agencies
- Providing a standardised framework for case management by agencies and;
- Supporting consistent support responses for clients.

This user guide is provided to assist you in understanding how to use H2H.

H2H support page

A support page for the H2H system can be found by clicking the H2H support link at the bottom of every screen of H2H.

The H2H support page contains valuable information regarding:

- Updates to the system
- Training materials (including this manual)
- How to get access to H2H
- Information on client consent
- Forms
- Data collection information, and
- Where to find help

The H2H support page is updated with new information regularly and should be your starting point for assistance.

About the Specialist Homelessness Services Data Collection

H2H is accredited as an approved client management system for the National Specialist Homelessness Services collection (SHSC). All client data required for the SHSC is obtained from H2H. Client information is depersonalised, and extracted for submission to the Australian Institute of Health and Welfare (AIHW) each month

For information on the SHSC, you can visit the AIHW's website at www.aihw.gov.au

Information from H2H is also utilised for State Reporting, managed by the South Australian Housing Trust, allowing agencies to be provided with additional reports to aid in performance monitoring processes. Agencies are provided with monthly Key Performance Indicator and Service Delivery reports, in addition to statistical summaries provided by the AIHW.

Getting access

Access to H2H is restricted to workers of agencies funded to provide specialist homelessness services in South Australia. Due to the highly sensitive nature of client information on the H2H System, access is controlled by Department of Human Service. For access, complete and return a New User Agreement form found on the support page (by clicking the H2H support link at the bottom of every page of H2H).

Security

As H2H stores sensitive information about clients, security measures are in place to prevent unauthorised access and protect client information.

System security

The web entry point for the H2H system is housed in the Department of Justice Web Vault, protected by firewalls to prevent unauthorised access. Other parts of the system run on servers that are housed behind Firewalls. All firewalls are monitored constantly and tested regularly. All data in the H2H system is encrypted while stored and when transmitted.

User security

All users complete a signed and authorised agreement, before being granted access to H2H. The conditions for use of the system can be found on the user access form. These controls ensure that no one has access to client information without the appropriate authorisation.

Access to H2H is password protected. A unique username and temporary password are provided to you when the account is created.

Your password should never be shared with anyone to ensure client information is protected. Passwords should not be stored in your web browser but should be typed into the system each time you log on. Access to data within the system is audit logged to ensure the system administrator can track who reads or updates client data. Data audits will be carried out at times to ensure all users are using the system in line with conditions of use.

Client security

Visibility of client personal information in H2H is dictated by a consent function. The information that you can view on a client record where you do not have any consent is limited to:

- Client name
- Sex
- Date of Birth
- Any previous supporting agencies through the client 'pathway'
- Consents
- Presenting unit
- Alerts

This restriction provides protection for client information held by your agency.

Consent and information sharing


Clients must be provided with the Notice of Information provision at the start of their support. This document outlines the client's rights regarding their personal information. You can find a copy of this document by following the link on the intake screen, or by visiting the support page.

Freedom of information

Clients have a right to access the information held about them. Clients also have a right to request the amendment of their client record if it is inaccurate, incomplete, irrelevant, out of date, or would give a misleading impression. The agency that collected the information is responsible for providing it to the client. If the agency is no longer operational the client can make a freedom of information request to the South Australian Government.

Tips for navigating H2H

Below is some general information about using H2H;

H2H tips	
Single clicks	All buttons and fields in H2H can be accessed with a single click. A double click will load the page/field twice, slowing down system speed
Browser links	A link to the logon screen can be saved in your web browser favourites for quick access
Back button	The 'back' button on an internet browser won't work in H2H. You will be automatically logged out of H2H if you click the back button. This function exists to protect the security of client information on H2H.
F11	To avoid accidental use of the 'back' button on your browser, you can enter full screen by pressing the F11 key on your keyboard
Copy/paste	the 'right click' mouse menu functions to cut, copy and paste don't work in H2H. To copy/paste information use the Ctrl C (copy) and Ctrl V (paste) functions on your keyboard
20 minute timeout	There is a 20-minute timeout function in H2H. If the system is idle (no buttons are selected) for 20 minutes, you will be automatically logged out. This function exists to protect the security of client information on H2H.
Mandatory fields	A yellow field indicates that the field is mandatory. You will not be able to proceed without entering valid information. Attempting to do so will result in a red text error message at the top of the screen, telling you what has been missed.
Tool tips	If you are unsure of the meaning of an icon in h2H you can hover over it and a tip will be displayed
Information bubbles 	Information bubbles can be hovered over for more information about the question.

Logging in to H2H for the first time

Once you've been given access, you will receive a user name and a temporary password to start the account activation process. User names and passwords are case sensitive.

On the logon screen, enter your user name and temporary password, and then select the 'Login' button, as seen below;

Important notice

Do not attempt to log onto this system unless you are an authorised user. By logging on, you agree to use this system in compliance with the policies of your agency and the South Australian Department of Human Services.

Login to H2H

Enter your user name and password to login.

User name

Password

[Forgotten your password?](#)

Note: user name and passwords are case sensitive, always check that your caps lock key is not on before logging in.

On the next screen you will be prompted to change your password.

Change password

The system generated temporary password. Can be entered using keyboard copy paste shortcuts, or by typing in full.

- Contain at least 12 characters
- Contain both lower and upper case letters
- Include at least one number
- Include at least one symbol !@#\$%^&*?+=*+~

Current/temporary password *

New password *

Verify new password *

Once you have saved your new password you will be prompted to select two security questions and enter the answers.

Edit profile

System Admin : sadmin01

Security question 1 *	What is your mother's maiden name? ▾
Answer *	<input type="text"/>
Security question 2 *	What was the name of your first pet? ▾
Answer *	<input type="text"/>

Organisation	Unity Housing Company Ltd
Agency	Terrace Boarding House Liaison Worker
Program	The Terrace Boarding House Liaison Worker Program
Email address *	<input type="text" value="h2h@sa.gov.au"/>
Mobile Number	<input type="text" value="0444444444"/>
Job description	<input type="text"/>

[Change password](#)

These security questions can be used to reset your password if you forget it. Once you have completed all required fields, select the save button. This will take you to the homepage for your agency.

Levels of access

H2H has four levels of access. These levels control the information and functions you can access. Your manager will choose your access level, and it will not necessarily be the same as your job title or role.

Other worker:

You can perform the basic functions of adding, intaking, referring or closing a client record. This role is suitable for workers such as administration and front desk workers within agencies.

Case worker:

You can access most features of H2H however cannot open a case plan or add issues or goals within a case plan.

Case manager:

You can access all client features of H2H including the creation, management and closure of client case plans.

Agency manager:

You can access all features of H2H as well as the ability to assign clients to workers, access the referral menu and the ability to view and print agency reports.

User roles and functionality

	Other worker	Case worker	Case manager	Agency manager
BASIC FUNCTIONS				
Search for a client	✓	✓	✓	✓
Edit client personal details	✓	✓	✓	✓
Add consent to a client	✓	✓	✓	✓
Add/edit/delete notes to a client	✓	✓	✓	✓
View the client pathway	✓	✓	✓	✓
Set client as unassisted	✓	✓	✓	✓
INTAKE				
Complete an Intake	✓	✓	✓	✓
Add/repeat a service	✓	✓	✓	✓
Edit a Service	✓	✓	✓	✓
Send a service referral (intake)	✓	✓	✓	✓
Add a presenting unit	✓	✓	✓	✓
ASSESSMENT				
View an Assessment	✓	✓	✓	✓
Complete an Assessment		✓	✓	✓
CASE PLAN				
View/Open Case Plan			✓*	✓
Add an issue/strength to a Case Plan			✓*	✓
Add/repeat a service		✓*	✓*	✓
Send a service referral		✓*	✓*	✓
Edit/close a service		✓*	✓*	✓
Close an issue			✓*	✓
Create a Case Exit			✓*	✓
END SUPPORT				
View an End Support	✓	✓	✓	✓
Complete an End Support	✓	✓	✓	✓
REFERRALS				
Send a client referral	✓	✓	✓	✓
View/accept/reject incoming referrals				✓
ADMIN TOOLS				
View/Print reports				✓
Assign/Reassign workers to clients				✓
Set client as Sensitive/Locked				✓
Set client as deceased				✓
View unassigned clients list				✓

* The ability to perform these functions is based on worker assignments

The homepage

The screenshot shows the H2H Agency 4 homepage. At the top, a green header contains the text 'homeless HOME H2H Agency 4' (callout 1) and navigation links: Home (callout 2), Search clients (callout 3), Add client (callout 4), Referrals (callout 5), and Reports (callout 6). Below the header, a user profile bar shows 'Kirsten Moyle' with links for 'Edit profile' and 'Log out / Change agency' (callout 7). On the left, a sidebar contains 'Draft clients (0)' (callout 8) and 'My clients (1)' (callout 9). The main content area features a 'Welcome to the H2H homepage' message (callout 10) and a 'Reminders' section (callout 11) with the text 'No reminders available'. Below this is an 'Inbox' section (callout 12) listing various tasks: Pending client referrals (0), Pending service referrals (0), Pending consented services (0), In progress intakes (0), Pending unmet needs (0), In progress assessments (0), Pending case plan reviews (0), Pending post case reminders (0), Consent for information sharing expiring (0), and Clients without activity (0). At the bottom, a footer contains version and app information (callout 13) and support links (callout 14).

The H2H homepage		
1	Agency name	Displays the Agency that you are currently logged into.
2	Home screen button	Will return you to the home screen from anywhere in the system.
3	Search screen	Navigates to the search screen to search for a client record in the H2H system.
4	Add client screen	Navigates to the create new client screen.
5	Referrals screen	Available only to Agency Managers. All incoming and outgoing service and client referrals can be viewed and actioned from this page. Also contains a referral search function.
6	Reports screen	Available only to Agency Managers. Several reports about client status, workloads and other information can be downloaded from this screen.
7	Draft clients	Lists any client records for the agency that are still in draft status (add client process has not been completed).
8	My clients menu	Displays clients that are assigned to you as either case worker or case manager, sorted alphabetically and grouped by presenting unit (if relevant)
9	Reminders	Displays reminders due today, and this week, where there are incomplete actions for assigned clients, like intakes, assessments, or consents reaching their end date. Agency managers will see reminders for all agency clients.
10	Edit profile and log out/change agency button	View and edit your profile details like security questions, email address and password. The log out button logs you out of H2H. If you have access to more than one agency, you can use this button to change between them.
11	Unassigned clients list	Available only to Agency Managers. Displays all clients who are not currently assigned to a worker.
12	Inbox	Displays information about all pending action for your assigned clients, including unmet needs, pending referrals and consented services, case plan review dates, post case reminders and clients without activity. Agency managers will see information for all agency clients*.
13	Version number	Displays current version number information for H2H.
14	SA.Gov links	Links to copyright and privacy information on the SA.Gov website, and the H2H support page where users can find help and training information.


*more information about the inbox is located on the next page

The inbox

In the inbox you can see information about all pending items for your assigned clients, including unmet needs, pending referrals and consented services, case plan review dates, post case reminders and clients without activity.

Note: information displayed in the inbox is determined by your access level. Agency managers will see information for all clients of the agency, and workers with case manager, case worker or other worker will see only clients that are assigned to them.

Each inbox menu item can be expanded and the items within can then be opened via the hyperlinked client name.

 Inbox
Pending client referrals (7)
Pending service referrals (9)
Pending consented services (3)
In progress intakes (1) Intake for <u>Smith, John</u> must be completed within 3 day(s)
Pending unmet needs (0)
In progress assessments (0)
Pending case plan reviews (0)
Pending post case reminders (0)
Consent for information sharing expiring (26)
Clients without activity (0)

Click within the row to view items, then select underlined name to go to the item in the client record

The inbox	
Pending client referrals	Displays outgoing client referrals that have not been actioned by the receiving agency.
Pending service referrals	Displays outgoing service referrals that have not been actioned by the receiving agency.
Pending consented services	Displays services that you have provided as a consented agency, that have not been acknowledged by the lead agency.
In progress intakes	Displays clients where an intake has been started but not completed. Reminders will display when it has been more than 7 days since the intake was started. An intake must be completed within 28 days from creation. If it is not completed within this period, the intake will be closed as incomplete, and the client record set to inactive.
Pending unmet need	Displays clients who have a current unmet need for a service.
In progress assessments	Displays clients where an assessment has been started but not completed. Reminders will display when it has been more than 7 days since the assessment was started. An assessment must be completed within 28 days from its creation.
Pending case plan reviews	Displays clients with an upcoming case plan review scheduled. Review dates can be set from the case plan cover page in the client record.
Consent for information sharing expiring	Displays clients with an existing consent to share information, which is due to expire.
Clients without activity	<p>Displays client records with no activity this month. Two types of alerts appear in this menu;</p> <ol style="list-style-type: none"> 1. Casual or assessed clients with no activity for a full calendar month; <ul style="list-style-type: none"> • At the end of the month, these clients will be automatically closed by the system and their record set to inactive. This is known as a 'System Close' 2. Case managed (Active) clients, whose case plans have not been updated for 30 days <ul style="list-style-type: none"> • An alert will display for case managed clients who have not had activity recorded for a full calendar month. • Activity consists of adding a service to the case plan • These clients will not be automatically closed due to inactivity

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SEARCHING AND ADDING CLIENTS

Searching in H2H

A thorough search on H2H **must** be completed before adding a new record. Adding a client that is already on H2H creates a duplicate record that in most instances can't be deleted.

Performing a search

When searching for a client use minimal information. The search function only returns search results that match the exact combination of information you entered, so being too specific can prevent you finding a possible match. Searching using minimal information is called the *less is best rule*.

Less is best rule:

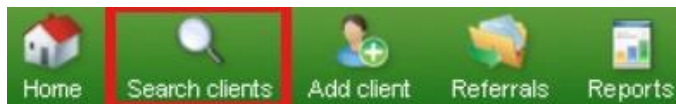
Client John Smith, born 20/09/1967 has presented at your agency. Rather than searching for all of these terms you should search using only the first initial, and last name.

If this returned a large number of results you could then add in the full first name to narrow the results.

If there were still a number of matching clients, you could then add the year of birth to narrow the results down even further.

The search function

To perform a search, click the 'search clients' icon located in the top right-hand corner of the home screen.



There are two options for completing a search on H2H. The *Basic Search*, which appears as follows;

A screenshot of the 'Search clients' form. On the left is a 'Client search' sidebar with 'Basic search' selected. The main form has fields for 'Client number', 'Surname', 'Alias/nickname', 'Sex', 'First names', 'Date of birth' (with dd, mm, yyyy sub-fields), and 'Status'. There is a 'My agency only' checkbox. At the bottom are 'Search', 'Clear', and 'Add client' buttons.

Or the *Advanced Search*;

Client search ▲

Basic search

Advanced search

Advanced search

Client number

Date of last contact dd/mm/yyyy

Medicare # Centrelink CRN

Last known address

Unit number

Street number Street name

Suburb 🔍

State Post code

Country

Emergency contact person

Name

Additional client information

Most existing client records can be successfully located using the Basic search function.

About the search screen

Once you have entered your search terms, and selected the search button, the search results are displayed. For example;

Search clients

Client number

Surname First names

Alias/nickname Date of birth dd mm yyyy

Sex Status

My agency only







Results: 1-20 of 25

Name	👤 DOB	Status	Client pathway	First /last contact
Green, Apple 55667227	F 1990	Inactive	Intake 09/11/2011 → Assessment 09/11/2011 → Case plan 09/11/2011	09/11/2011
Green, Bronti 55664875	F 1988	Assessed	Intake 19/02/2015 → Assessment 19/02/2015 → Case plan n/a	10/08/2011 19/02/2015
Green, Brown 55687812	F 2000	Casual	Intake 10/02/2015 → Assessment n/a → Case plan n/a	10/02/2015 19/02/2015
Green, Christine 55665339	F 1985	Inactive	Intake 17/08/2011 → Assessment 17/08/2011 → Case plan 17/08/2011	17/08/2011 19/02/2015
Green, Clare 55684583	F 03/04/1984	Inactive	Intake 01/05/2014 → Assessment 01/05/2014 → Case plan 01/05/2014	01/05/2014 01/05/2014
Green, Dallas 55668439	M 15/8/1989	Inactive	Intake 21/02/2012 → Assessment 21/02/2012 → Case plan n/a	21/02/2012 21/02/2012

As shown in the example above, results are alphabetically listed, and client information can be seen including name, sex, Date Of Birth, client status, most recent client pathway, and first and last dates of contact.

Search by Assigned Worker: for those users who have agency manager level of access, the search function will also allow searching by assigned worker. See the [Agency Manager functions](#) section for further detail.

Icons on the screen also give information about the client;

Search screen icons		
	Lead Agency	Indicates that your agency is the current or most recent lead agency.
	Consented agency	Indicates that there is a current consent for your agency to view parts of the client's record.
	Alert	Indicates an alert exists on the client's record. You can view the alert by clicking on the record to open the client summary page. See the ' Alerts ' section to learn how to add an alert.
	Sensitive	Client is set as sensitive. This icon (and client record) is only visible if you are a lead or consented agency. See the ' Sensitive and locked ' section for more detail.
	Locked	Client is set as locked. This icon (and client record) is only visible to the Agency manager of the lead agency, and any worker (lead or consented) who has been assigned to the client. See the ' Sensitive and locked ' section for more detail.
	Add a draft client based on this clients' record	Starts a new client record based on the details of this client's record. This function copies over information regarding country of birth, surname and addresses to a new client record, saving time for the user when adding multiple family members to h2H. See the Adding a new client section for more detail.

To open a client record to view, use a single click anywhere in the white sections of the search results'

Search clients

Client number

Surname First names


Alias/nickname Date of birth

Sex Status

My agency only

Results: 1-20 of 25

Name	DOB	Status	Client pathway	First /last contact
Green, Apple 55667227	F 1990	Inactive	Intake 09/11/2011 → Assessment 09/11/2011 → Case plan 09/11/2011	09/11/2011
Green, Bronti 55664875	F 1988	Assessed	Intake 19/02/2015 → Assessment 19/02/2015 → Case plan n/a	10/08/2011 19/02/2015
Green, Brown 55687812	F 2000	Casual	Intake 10/02/2015 → Assessment n/a → Case plan n/a	10/02/2015 19/02/2015
Green, Christine 55665339	F 1985	Inactive	Intake 17/08/2011 → Assessment 17/08/2011 → Case plan 17/08/2011	17/08/2011 19/02/2015
Green, Clare 55684583	F 03/04/1984	Inactive	Intake 01/05/2014 → Assessment 01/05/2014 → Case plan 01/05/2014	01/05/2014 01/05/2014
Green, Dallas 55668439	M 15/8/1989	Inactive	Intake 21/02/2012 → Assessment 21/02/2012 → Case plan n/a	21/02/2012 21/02/2012

An underlined entry in the client pathway  indicates that you have consent to view that information. Clicking directly on an underlined item, e.g. Intake, Assessment, Case plan, will redirect you to the cover page of that pathway entry to view further information.

Clicking on a pathway item where you do not have consent will direct you to the client summary page, however visible details will be minimal.

The client status

Every client record in H2H has a status, displayed alongside the client number, and in the status column on the search results screen. The client status indicates what stage the client is at in their pathway.

homeless2HOME Terrace Boarding House Liaison Worker

Client > Client summary

Client

- Client summary
- Personal details
- Contact details
- Income
- Housing
- Risk assessment scores
- Notes
- Assignments
- Alerts

Client summary

Albert Brown

Client number 56492514 (Active) Date of birth 31/08/1991 (34)

Lead agency Terrace Boarding House Liaison Worker

Alerts

Date created	Description	Expiry date
16/03/2026	Albert has a number of aggressive dogs on his property. Confirm dogs are secured before entering.	

Client is the head of the presenting unit

Client status definitions	
Draft	A client is part way through the 'add client' process but has not yet been saved.
New	A client has been added to H2H but has not yet had any activity (Intake, Assessment or Case Plan).
Casual	A client has a completed Intake, but an assessment has not yet been done.
Assessed	A client has undergone an assessment but does not yet have a case plan.
Active	A client has an active case plan.
Inactive	A client's support has ended, and record closed using the end support or case exit function. <i>OR</i> The record has been auto-closed by the system due to inactivity.
Unassisted	A client has been recorded as unassisted after presenting to an agency and not receiving a service.

Next steps after searching

Once you have completed follow the instructions below to continue.

Where to next?	
No records exist for the client	Continue to the Add client section.
You found a match with inactive or unassisted status	Continue to the Intake section.
You found a match with casual, assessed or active status	Contact the current lead agency to discuss.

Adding a new client

Starting to add a client

If a thorough search has not returned any client matches, you will need to create a new client record. When adding a client to H2H you have the option to start the process from three different places within the system. These are:

1. Add a client from the Search Screen.

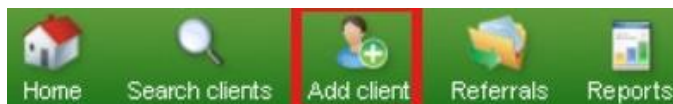
- Select the button on the search clients screen (shown below). After completing a search of H2H to ensure your client is not already on the system, you would click this button to begin adding the new client using information you have already entered in your search

Search clients

Client number	<input type="text"/>	First names	<input type="text" value="Sam"/>
Surname	<input type="text" value="Jones"/>	Date of birth	<input type="text"/> dd <input type="text"/> mm <input type="text"/> yyyy
Alias/nickname	<input type="text"/>	Status	<input type="text"/>
Gender	<input type="text"/>	Assigned worker	<input type="text"/>
Agency only	<input type="checkbox"/>		

2. Add a client from the main menu

- Select the *Add client* button at the top right of any H2H screen (shown below). This option should only be used if you have already completed a search and are confident that the client is not already on H2H



3. Add a client based on another clients record

- Search for the existing client that you want to base your new client on, and locate the icon on the search results page (shown below). This icon allows you to add a new client based on an existing clients record. The existing clients cultural identity, contact information and housing history is automatically transferred to the new client, saving users time completing this information for the new client

Name	DOB	CRN	Medicare #	Status	Lead agency	
Greenwood, Sam 56448306	M 21/06/1983			Inactive	Homelessness Gateway Service	

Duplicate checks


The add client process has several built-in duplicate checks. A duplicate check involves the system highlighting any potential matches to the new client, based on;


- Name
- Sex
- Date of birth
- Centrelink and Medicare details (if available)

For example, below you can see a screenshot where draft client Sam Greenwood, has returned several potential matches.

The first has identified that the first and last name match for the draft client and the existing listed client.








Add client: client match


Current draft client				
Name		DOB	CRN	Medicare #
greenwood, Sam		01/01/1978		

 **There are existing client/s which match the entered criteria**
Please perform one of the following:

- Select one of the matching clients and discard the current draft client
- Or if the current draft client doesn't match any of the matched clients then click on **Add client**
- Or if you have made a data entry error then click on **Cancel** to go back to Duplicate check screen and reenter the client details.

Results: 1-20 of 170

Matching clients							
Name		DOB	CRN	Medicare #	Status	Lead agency	
Greenwood, Sam 56448306	M	21/06/1983			Inactive	Homelessness Gateway Service	
Greenwood, Ashley William 56106633	M	05/08/1979	305552618J		Inactive	Street to Home	
Greenwood, Christopher 56116885	M	03/01/1980			Inactive	Outer Southern Generic Homelessness Service	
Greenwood, Kylie 56160109	F	21/09/1981			Inactive	Outer Southern Generic Homelessness Service	
Greenwood, Melissa 56069969	F	03/04/1983	502414620V		Inactive	Catherine House Supported Accommodation Service	

If you determine that an existing record is a match for the client being entered, you can select the  icon to discard your draft client, and use the selected client. If none of the listed clients match your draft client, select the 'Add client' button at the bottom of the page to proceed.

Add client page

The *add client: client details* page captures all the information needed to add a new client to the H2H system. Yellow fields are mandatory and must be completed before you can proceed.

On this page you also have the ability to set your client record to sensitive or locked (Function only available to users with agency manager level access).

Client **personal details** are captured here. Pregnancy fields will only appear for client record with sex selected as 'female' or 'other'

Client **cultural identity** details are captured here

Any **external agencies** that your client may be involved with are recorded here

Client **contact** details are recorded here

Emergency contact details are recorded here

Clients **housing history** is recorded here
Note: additional addresses can be added at the intake stage

Add client: client details

Client number

Date of first contact * dd/mm/yyyy

Sensitive Lock client

Personal details

Surname First name

Other names Alias

Date of birth * dd mm * yyyy DOB status *

Marital status

Sex *

Pregnant

Due date dd/mm/yyyy Doctor

Doctor's address

Cultural identity

Aboriginal *

Torres Strait Islander *

Language other than English spoken at home? *

Other language * Interpreter required

Spoken english proficiency *

Does not read English Does not write English Needs help completing forms

Country of birth *

External agency details

Medicare #

Centrelink CRN DVA

South Australian Housing Trust client #

Department for Child Protection client #

Contact details

Phone # Mobile #

Email Address

Alternative contact

Name

Phone # Mobile #

Emergency contact

Name

Relationship

Phone # Mobile #

Address

Housing

Most recent addresses

No details currently exist for this client

Additional client information

Note: *all information entered into the client details screen can be edited by the lead agency at any stage in the client pathway. See the personal details section for more information.*


Housing panel

The housing panel is used to record your client's addresses, both current and historical. All addresses that are entered here are saved onto the client record and are carried through to intake. To enter an address for a you must record at minimum;

- House type
- Tenure
- Occupancy Condition
- Living arrangement
- Suburb
- Country
- Date moved in

There is no limit to the number of addresses that can be recorded in this panel.

It is not mandatory to enter client addresses at this stage; address details can also be added during the intake process if needed.

To add an address within the housing panel, click the  button. The following popup will appear:

Add address

Housing type *

Tenure *

Conditions of occupancy *


Living arrangements *

Property details

Unit number



Street number

Street name Street type


Suburb * 

State * Post code *

Country *

Permanent  Current 

Date moved in * Date moved out

Selecting the  icon will bring up the 'Find a suburb' tool, where you can search for all or part of a suburb name, or select the checkbox to search all Australian suburbs. For example, a search for suburbs containing the word 'Green' would appear as follows;

Find a suburb

Enter all or part of the suburb name to filter your search.

Include all Australian suburbs

Search Results		Suburbs: 1 - 9 of 9
Suburb	Postcode	State
GREENACRES	5086	SA
GREEN FIELDS	5107	SA
GREENWITH	5125	SA
GREEN HILLS RANGE	5153	SA
GREENBANKS	5253	SA
GREENHILL	5140	SA
GREENWAYS	5272	SA
GREENOCK	5360	SA
GREEN PATCH	5607	SA

◀ Previous | Page: 1 | Next ▶

You can select the correct suburb with a single click anywhere on the search result line.

Once selected the suburb name, state and post code will be entered into the address, as seen below;

Add address

Housing type * ▼
 Tenure * ▼
 Conditions of occupancy * ▼
 Living arrangements * ▼

Property details i

Unit number

Street number

Street name Street type ▼
 Terrace

Suburb * Q

State * SA Post code * 5107

Country * ▼
 Australia

Permanent i Current i

Date moved in * C Date moved out C

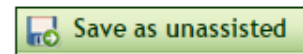
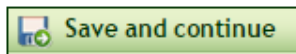
For each address you can also indicate whether this address was a permanent address (i *Tenure in a conventional dwelling for at least 3 months*), and/or the current address (i *select to indicate if this is the client's current living situation*). Once all mandatory fields have been completed the address can be saved. The address will then appear in the housing panel.

Housing

Address	Housing type	Moved in	Moved out	Perm	Current	
Unit 6 / 27 Bramble Terrace, GREEN FIELDS SA 5107	House/townhouse/flat	29/10/2018		Yes	Yes	

Completing the client entry

After completing all the mandatory (yellow) fields on the page you have the option to save and continue or save as unassisted at the bottom of the page



- The *save and continue* button will take you to the confirmation page where you will finalise adding the client record.
- The *Save as unassisted* button allows you to set your client status to *unassisted*. Go to the [unassisted history section](#) for more information.

Add client: confirmation page

The confirmation page is the final step in the *add client* process. If there are any possible client matches to the client you are currently adding, they will be listed here, as the system completes one final duplicate check. In the example below, you can see there are 3 potential matches;

homeless HOME Whyalla Generic Homelessness Service (Youth Focus)

Client > Add client: confirmation

Add client

- ✓ Client details
- Confirmation

Add client: confirmation

John Smith

Client number 55662024 (Draft) Date of birth 05/05/1983 (30)
Lead agency Whyalla Generic Homelessness Service (Youth Focus)

Current draft client

Name	DOB	CRN	Medicare #
Smith, John 55662024	Male 05/05/1983		

Similar records have been found in the system
Check the table for possible matches to client you are currently adding into the system.
Clicking on a row will take you to browse that client's information.

Results: 1-3 of 3

Matching clients


Name	DOB	CRN	Medicare #	Status	Lead agency
Smith 55662000	M 1980			Unassisted	Community Transition Worker - Hutt Street Centre
Smith 55662017	M 1980			New	Community Transition Worker - Hutt Street Centre
Smith, Sam 55661980	M 15/08/1980			New	Community Transition Worker - Hutt Street Centre


◀ Previous | Page: 1 | Next ▶

Complete client entry Cancel Discard draft client

If none of the listed client records match the client you are adding, click the *complete client entry* button to finalise the *add client* process. This will change the client status to *new* and you will be directed to the *add intake* page.

The *cancel* button will take you back to the previous page, and the *discard draft client* button will delete all the information you have added so far and remove the draft from the system completely.

The *use selected client* button  allows you to select that client record for use, and discard the current client record you are adding. You will notice the *use selected client* button at the end of each matching client row listed. Selecting this icon will bring up the following pop up;

 **Warning: Using the selected client**

This will discard the current draft client and redirect you to the selected client.

Are you sure you want to use the selected client?

- Selecting yes will discard the draft client and redirect to the selected client
- Selecting no will return you to the confirmation page

Clicking within any rows in the matching clients table will take you to that client's summary page, and the current record you are adding will be saved as *draft*.

homeless²HOME

THE CLIENT MENU

The client menu

Once a client is added to H2H, the client menu expands (as shown right) to include all pages that are captured within the client record.

Where no information has been recorded on a page then the message 'no details currently exist for this client' will be displayed. Each page will contain this message unless:

- The information has already been added as of the *add client* process (such as housing information).
- An Intake, Case exit or End support is completed (details entered on these functions save back to the client pages); or
- Information is added to these pages directly.

Client
Client summary
Personal details
Contact details
Income
Housing
Notes
Assignments
Alerts
Consents
Client pathway
Refer client
Referral history
Unassisted history

Note: if you will be proceeding to intake you do not need to enter information manually into the client menu screens. It will be collected during the intake process.

The personal details, contact details, income, housing and risk assessment screens will all display the most current information for the client.

homeless HOME Whyalla Generic Homelessness Service (Youth Focus)

Client > Client details > Income

Client	Income
<div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">Client</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Client summary</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Personal details</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Contact details</div> <div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">Income</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Housing</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Notes</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Assignments</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Alerts</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Consents</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Client pathway</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Refer client</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Referral history</div> <div style="background-color: #e0f2f1; padding: 2px; text-align: center;">Unassisted history</div>	<div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc;"> <p>John Smith </p> <p>Client number 55662024 (New) Date of birth 05/05/1983 (30)</p> <p>Lead agency Whyalla Generic Homelessness Service (Youth Focus)</p> </div> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc; margin-top: 5px;"> <p>Income details No details currently exist for this client</p> </div> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc; margin-top: 5px;"> <p>Government assistance No details currently exist for this client</p> </div> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc; margin-top: 5px;"> <p>Employment details No details currently exist for this client</p> </div> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc; margin-top: 5px;"> <p>Additional income information</p> </div> <div style="margin-top: 10px;"> <div style="background-color: #4CAF50; color: white; padding: 2px; display: inline-block;"> Edit income</div> </div>
<div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">Intake</div> <div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">Assessment</div> <div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">Case plan</div> <div style="background-color: #4CAF50; color: white; padding: 2px; text-align: center;">End support</div>	

Editing personal details

All of the information in the client menu pages can be edited using the 'edit' button that appears at the bottom of each screen.

Client | Personal details

Client summary
Personal details
Contact details
Income
Housing
Notes
Assignments
Alerts
Consents
Client pathway
Refer client
Referral history
Unassisted history

Intake
Assessment
Case plan
End support

Person Test

Client number: 55767538 (New) | Date of birth: 2020 (3)
Lead agency: H2H Generic Training East

Date of first contact: 15/02/2023 | Marital status

Cultural identity

Aboriginal: Yes
Torres Strait Islander: Yes | Community of origin
Language other than English spoken at home: No
Spoken english proficiency: Not applicable
Does not read English | Does not write English | Needs help completing forms
Country of birth: Australia

External agency details

Medicare #
Centrelink CRN | DVA
SA Housing Authority (Housing SA) client # 23423423
Department for Child Protection client

Disability or assistance

Needs help or supervision: Don't know
NDIS support: No

Education

Formal education / training: Don't know

Care or protection

Under a care or protection order: No
Other custody order / arrangement

Additional client information

[Edit personal details](#)

Once in edit mode, most fields can be updated as needed. Regular updates are important to ensure accuracy of client information.

Completing an agency Housing Needs Assessment

An online version of the SA Housing Trust Housing Needs Assessment (HNA) is available via a link in the Homeless2Home (H2H) system, located on the edit personal details screen as shown below.

This alternate option to completing the existing Agency HNA, allows for the entire HNA process to be completed online, including submission of supporting documents, and involves the verification of both client and agency/worker information via H2H, to allow for client matching and identification of the support provider

homeless HOME H2H Agency 4


Client > Personal details > Edit personal details

Client

Client summary
Personal details
 Contact details
 Income
 Housing
 Risk assessment scores
 Notes
 Assignments
 Alerts
 Consents
 Client pathway
 Refer client
 Referral history
 Unassisted history

Intake
Assessment
Case plan

Edit personal details

Ruby Evans 

Client number 56679762 (Active) Date of birth 1990 (33)

Lead agency H2H Agency 4

Date of first contact * 22/01/2019

Sensitive No Lock client No

Personal details

Surname Evans First name Ruby

Other names Alias/Nickname

Date of birth * 01/01/1990 DOB status * Unconfirmed

Marital status Single

Sex * Female

Pregnant

Cultural identity

Aboriginal * Yes

Torres Strait Islander * No Community of origin

Language other than English spoken at home? * No

Spoken english proficiency * Not applicable

Does not read English Does not write English Needs help completing forms

Country of birth * New Zealand Year of first arrival * 2002

Residency status * Permanent Resident

External agency details

Medicare #

Centrelink CRN DVA

SA Housing Authority (Housing SA) client # 22222222 **Add Housing Needs Assessment**

Department for Child Protection client #

Key points to consider when choosing this HNA option for your client are:

- Has your client consented to the sharing of information with the SA Housing Trust? This should be recorded as per your agencies existing consent procedures
- Do you have all the required client details in H2H? To match the client from H2H to the Trust’s Housing Connect system you must have:

Confirm: Add a Housing Needs Assessment

You will be taken to a new window, to complete and submit a new housing needs assessment for this client. You will need the following:

- Housing SA client number
- date of birth
- full name
- any supporting documents

PLEASE NOTE: The client must have already completed a registration of interest with Housing SA - clients can do this online via sa.gov.au

Yes No

- Housing Trust client/customer number
- Date of birth (DD/MM/YYYY)
- Full name (First and Surname)

- Does the client have an existing Registration of Interest with the SA Housing Trust? This must have been completed, and income and identification verified prior to the HNA.
- Do you have all support documents ready to upload? There is no ability to SAVE progress on a HNA or add documents after submission
- Are the documents for upload correct? You will be unable to delete incorrect documents. You must upload the correct documents as well as any mistaken ones or begin the assessment again.

- Do you have clarity around the client's circumstance and answers to the questions the in the HNA? Once the HNA is submitted the Category outcome will be based on what is included with no follow up. Text fields will allow for up to 1000 characters
 - You can find further information about the information and evidence required at sa.gov.au
 - Once submitted, the HNA is directed to an Access worker at the SA Housing Trust for review, and the client/customer will be advised of the outcome via their preferred contact method.


Note: like H2H, the online HNA has a 15-minute timeout to protect the privacy of client information, which will reset as you progress to the next page in the HNA. Be mindful of time taken to type responses on each page, as your progress will not be saved if you are timed out.



Housing

You can update your clients housing situation at any stage in the client pathway. All addresses are kept in the housing screen, with the ability to record the duration of the client's stay at that address using the moved in/moved out date fields.

The client's most recent current address (current checkbox selected, and no moved out date) will be displayed at the top of this list in **bold** type. You can only have one open current address at a time.

Housing

John Smith 					
Client number	56679786 (Casual)	Date of birth	1999 (20)		
Lead agency	Eastern Adelaide Generic Homelessness Service				

Address	Housing type	Moved in	Moved out	Perm	Current
6 First Street, GLENELG SA 5045	House/townhouse/flat	22/01/2019			Yes 
Unit 6 / 27 Bramble Terrace, GREEN FIELDS SA 5107	House/townhouse/flat	29/10/2018	21/01/2019	Yes	Yes 

[+ Add address](#)

To update the client housing situation, you will need to close the most recent current address by adding a moved-out date, before you add the new address.

Previous current addresses are also displayed, to be able to review the historic housing situations for the client, in order to assess outcomes over time.









Risk assessment scores

Users can record a risk assessment score for either Homelessness or Domestic Violence by selecting the 'edit score' button, and entering a number between 0-999, you can also complete the text field to indicate which scoring scale has been used.

homeless2HOME Terrace Boarding House Liaison Worker

[Home](#) [Search clients](#) [Add client](#) [Referrals](#)

Client > Risk assessment scores > Edit risk scores
 System Admin: [Edit profile](#) | [Log out](#) / C

Client	Edit risk scores												
<ul style="list-style-type: none"> Client summary Personal details Contact details Income Housing <li style="background-color: #4CAF50; color: white;">Risk assessment scores Notes Assignments Alerts Consents Client pathway Refer client Referral history Unassisted history 	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">Garry Brown </td> </tr> <tr> <td>Client number</td> <td>56680508 (Casual)</td> <td>Date of birth</td> <td>01/01/1987 (39)</td> </tr> <tr> <td>Lead agency</td> <td colspan="3">Terrace Boarding House Liaison Worker </td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Risk scores</p> <p>Risk score - enter all that apply</p> <p>Homelessness  <input style="width: 50px;" type="text" value="0"/> <input style="width: 100px;" type="text" value="Enter tool used"/></p> <p>Domestic Violence  <input style="width: 50px;" type="text" value="0"/> <input style="width: 100px;" type="text" value="Enter tool used"/></p> </div> <p style="margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p>	Garry Brown 				Client number	56680508 (Casual)	Date of birth	01/01/1987 (39)	Lead agency	Terrace Boarding House Liaison Worker 		
Garry Brown 													
Client number	56680508 (Casual)	Date of birth	01/01/1987 (39)										
Lead agency	Terrace Boarding House Liaison Worker 												

The most recent score and text description will be displayed if scores exist. Risk assessment scores can also be entered in the relevant issues within assessment and case plan.

Notes

The notes screen in the client menu displays all notes entered on the client record, and includes a button to add a new note, or to search existing notes.

- All notes in H2H will be date, time and author stamped once saved.
- Notes can only be edited or deleted until midnight on the day they were created.
- All notes are displayed in reverse chronological order, with the most recent notes at the top of the list.

Note: notes are not a mandatory function in H2H. It is up to the discretion of the individual agency to decide if they will use the notes function on H2H or record notes elsewhere.

Notes can also be searched by the following;

- Text (words or phrases that are contained with a note)
- Note type
- Author
- Agency
- Month or year created

The screenshot shows the 'Notes' section of a client record for Jessica Day. On the left is a navigation menu with options like Client summary, Personal details, Contact details, Income, Housing, Notes (selected), Assignments, Alerts, Consents, Client pathway, Refer client, Referral history, and Unassisted history. Below this are sections for Intake, Assessment, and Case plan. The main content area shows client details: Jessica Day, Client number 55672238 (Active), Date of birth 02/08/1995 (19), and Lead agency Eastern Adelaide Generic Homelessness Service. Below this is a search interface with a text input field, dropdowns for Note type, Author, and Agency, and a date created field with a year selector. Search and Clear buttons are present. The search results show one note: Date 19/03/2015 13:45, Type Client note, Author Kirsten Moyle, Agency Eastern Adelaide Generic Homelessness Service, and Note text 'Jessica contacted the office to a...'. An 'Add note' button is in the top right of the notes list. Page navigation at the bottom shows 'Page: 1'.

There are three types of notes in the H2H System, client, case and service notes.

1. Client notes

These notes travel with the client record, and are visible by the current lead agency, and any agency with a current consent. They are attached to the client record as a whole. Client notes can be added by either a lead or consented agency. Client notes can be edited or deleted by either a lead or consented agency until midnight on the day the note is created.


2. Case notes

These notes are part of the case plan and can only be added if a case plan exists for the client. They can only be viewed by the lead agency that created the case plan and cannot be viewed by any other agency on H2H at any stage. Setting consent to another agency will not give them access to view case notes. If the client is picked up by another lead agency in the future, and another case plan is opened, the new agency will not be able to access notes from any other agency's case plan. Historical case notes can be accessed through the [client pathway](#). Case notes can be edited or deleted until midnight on the day the day the note is created.

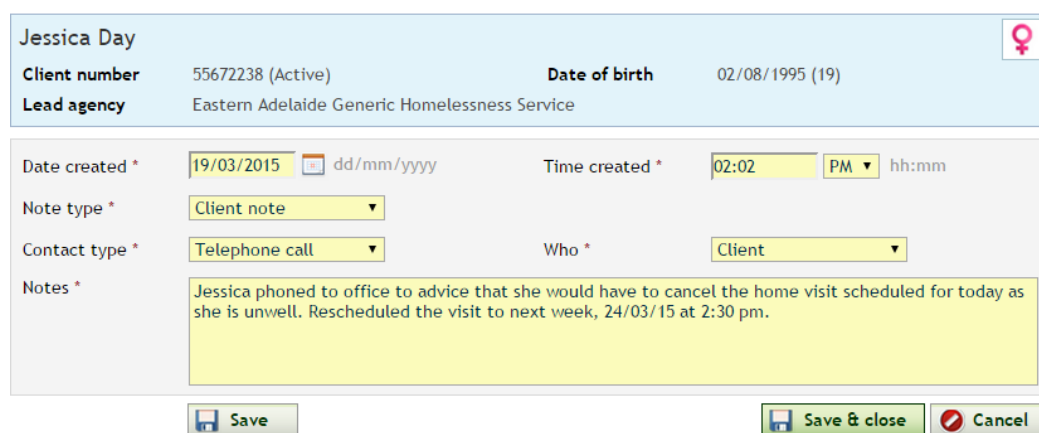
3. Service notes




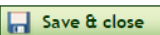

Service notes are also part of the case plan, but are more specific than a case note, being attached to a particular service within the case plan. Service notes can only be viewed by the lead agency or, where a consented agency has been referred an individual service, they will be able to add a service note once the referral has been accepted, and both the lead and consented agency will be able to view this. The consented agency will not be able to view any notes related to other services in the case plan. Service notes can be edited or deleted until midnight on the day the day the note is created.

Adding a note

All 3 types of notes can be added from the notes screen in the client menu. Select the  button to add a new note, and the add note screen will open;

Add note



Jessica Day 			
Client number	55672238 (Active)	Date of birth	02/08/1995 (19)
Lead agency	Eastern Adelaide Generic Homelessness Service		
Date created *	19/03/2015  dd/mm/yyyy	Time created *	02:02 PM hh:mm
Note type *	Client note		
Contact type *	Telephone call	Who *	Client
Notes *	Jessica phoned to office to advise that she would have to cancel the home visit scheduled for today as she is unwell. Rescheduled the visit to next week, 24/03/15 at 2:30 pm.		
		 	

When adding a note, the date and time will be automatically prefilled, however these can be backdated if required.

A contact type (e.g. phone call, meeting, SMS etc.), and person (e.g. client, 3rd party, etc) must be selected.

Notes can be entered either by directly typing, or by copy pasting using keyboard shortcuts to a maximum of 8000 characters.

- To complete the note, select the *save & close* button
- To save the note as it is and continue typing (to avoid the 20-minute timeout) select the *save* button. This will reset the 20-minute timer, and you can continue typing.
- To cancel the note without saving, select the *cancel* button.

Note: once a note has been saved & closed, it can be edited or deleted up until midnight on the day the note was created.

Case and service notes can also be added from the case plan menu. For further information see the [Case/service notes](#) section.

Editing a note

Client, Case and Service note types can only be edited or deleted on the day they were created. Notes that can be edited or deleted can be identified by the shaded background, notes created prior to the current day have a white background. To edit or delete a note click anywhere in the note on the notes screen.

homeless HOME Training H2H Generic Training East

Client > Notes

Client

- Client summary
- Personal details
- Contact details
- Income
- Housing
- Risk assessment scores
- Notes**
- Assignments
- Alerts
- Consents
- Client pathway
- Refer client
- Referral history
- Unassisted history

Intake

Assessment

Case plan

Notes

Jamie Brown

Client number 55770736 (Active) Date of birth 01/01/1974 (52)

Lead agency H2H Generic Training East

Search notes

Note type

Author

Agency

Date created

Search Clear

Results: 1-4 of 4

Notes list Add note

Date	Type	Author	Agency	Note
20/05/2026 12:14	Case note	Lachlan McConnochie	H2H Generic Training East	Notes that can be edited or delet...
19/05/2026 11:21	Service note	Lachlan McConnochie	H2H Generic Training East	Service notes provide more detail...
23/04/2026 14:30	Service note	Lachlan McConnochie	H2H Generic Training East	this is a service note for testin...
23/04/2026 14:27	Service note	Lachlan McConnochie	H2H Generic Training East	testing the delete service note f...

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To edit a note start typing within the note area and click save and complete when you have finished editing. To delete the note, click on the 'Delete' button and confirm the pop-up box.

The screenshot shows the 'homeless HOME Training' logo and 'H2H Generic Training East' header. The breadcrumb trail is 'Client > Notes > Edit note'. The left sidebar lists various client-related sections, with 'Notes' highlighted. The main content area is titled 'Edit note' and displays client information for Jamie Brown, including client number 55770736 and date of birth 01/01/1974. The form includes fields for 'Date created' (20/05/2026), 'Note type' (Case note), 'Contact type' (Telephone call), and 'Who' (Client). A large yellow text area is provided for the note content. At the bottom, there are buttons for 'Save', 'Delete', 'Save & close', and 'Cancel'. Red callout boxes provide instructions: one points to the note text area with the text 'Click in the note area to start editing the note. Click on 'save & close' to save the edit.', and another points to the 'Delete' button with the text 'Click the 'delete' button to delete the note.'

Assignments

This screen is visible only to those users with Agency Manager level of access. See the [agency manager functions](#) section for instruction on use of this function.

Alerts

The purpose of an alert is to flag any health, safety and/or service issues that are essential for workers to be aware of before working with a client. It is important to understand that:

- The placement of alerts on a client's record should be where there is a clear health, safety or service issue that is essential for staff to know before working with a client.
- Alerts can be placed on a client's record for both worker benefit (e.g. "client refuses to work with female staff") or the client's benefit ("client cannot read, do not send written information").
- Alerts are visible to all users on H2H, except where the client record has been set to sensitive or locked.


To add an alert, go to the alert's menu, and select the *add alert* button, and then enter the alert information and save, as seen below.

Add alert


Henry Bendigo 

Client number 55686044 (Active) **Date of birth** 1/6/1976 (38)


Lead agency Eastern Adelaide Generic Homelessness Service

Date created * 19/03/2015  dd/mm/yyyy

Alert description * Other - please specify 

Expiry date  dd/mm/yyyy

17/03/2015 Henry has a number of large dogs in his property. Use caution when entering 

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There is no limit to the number of alerts that can be added. Alert text and dates can be edited by selecting the edit pencil icon.

Consents


Setting consent to another SHS that uses H2H will allow that agency to view client information in the client, services and assessment menus. It will not allow that agency to view a case plan for that client.

You can find a list of all current or historical consents for information sharing between agencies, and a button for adding a new consent on the consent screen. From this screen, existing consents can also be edited by the lead agency that created them to extend the expiry date if required.

There are two types of consents in H2H.






- An Internal (within NAHA) consent: consenting to share information with another specialist homelessness service that uses H2H
- An external consent: a consent that allows the user to type in the consent manually for an agency that does not use H2H.


Consents

Jessica Day 

Client number 55672238 (Active) **Date of birth** 02/08/1995 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

Consents							
Date granted	Granted at	Type	Consented agency	Expired			
30/10/2013	Eastern Adelaide Generic Homelessness Service	Verbal	TAFE SA		Click to view/edit the consent		
27/11/2013	Eastern Adelaide Generic Homelessness Service	Written	Outer Southern Generic Homelessness Service	27/05/2014	Yes		
30/09/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Jobs SA	30/03/2015	No		
22/12/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Riverland Generic Homelessness Service	22/06/2015	No		
22/12/2014	Eastern Adelaide Generic Homelessness Service	Verbal	Inner Southern Service	22/06/2015	No	Click to add a new consent	





Note: prior to sharing information with other agencies via a consent, users should ensure that the client has granted verbal or written permission, or that they are covered by the Information Sharing Guidelines.

Adding a new consent


Select the *add consent* button to add a new consent

To share information with another SHS, select 'Within H2H (NAHA)' as the Agency Type; then select the *lookup agency* button;

Add consent

Albert Brown  


Client number 56492514 (Active) **Date of birth** 31/08/1991 (34)


Lead agency Terrace Boarding House Liaison Worker 


Information sharing


Date granted 20/04/2026


Granted at Terrace Boarding House Liaison Worker



Consent type * Verbal 

Client agreement * Yes 

Expiry date * 20/10/2026  dd/mm/yyyy

Agency type * Within H2H (NAHA) 

Consented agencies *  **Lookup agency**



 Save  Cancel

Then select the region, and the agency(s) within the region that the client has consented to share information with. You may select any number of agencies using this method, however you can only select from one region at a time.

Lookup agency


Region * Adelaide Hills
Eastern Metro
Eyre and Western

<input type="checkbox"/>	Agency	Region
<input checked="" type="checkbox"/>	Aspire Extension Program	Eastern Metro, Northern Metro, Southern Metro, Western Metro
<input type="checkbox"/>	Bramwell House - Adelaide Domestic Violence Crisis Accommodation Service	Eastern Metro, Statewide DFV Alliance
<input type="checkbox"/>	Catherine House	Adelaide Hills, Eastern Metro, Eyre and Western, Far North, Fleurieu and KI, Limestone Coast, Murray Mallee, Northern Metro, Southern Metro, Western Metro, Yorke and Mid North, Adelaide South Alliance, Adelaide North Alliance, Country South Alliance, Country North Alliance, Statewide DFV Alliance

 **Select agency**  Cancel

Once the required agency(s) have been selected, click the *select agency* button (shown above) to return to the consent screen and save the consent.

Add consent

Brown Bear				
Client number	55711722 (Active)	Date of birth	01/01/2000 (26)	
Lead agency	H2H Generic Training East			
Information sharing				
Date granted	20/04/2026			
Granted at	H2H Generic Training East			
Consent type *	Verbal <input type="text"/>			
Client agreement *	Yes <input type="text"/>			
Expiry date *	20/10/2026 <input type="text"/> dd/mm/yyyy			
Agency type *	Within H2H (NAHA) <input type="text"/>			
Consented agencies *				<input type="button" value="+ Lookup agency"/>
Aspire Extension Program				<input type="button" value="✕"/>
Bramwell House - Adelaide Domestic Violence Crisis Accommodation Service				<input type="button" value="✕"/>
Catherine House				<input type="button" value="✕"/>
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>		

Selecting the *save* button will return you to the consents screen, where you can view the consents that have now been added to the list.






Consents can also be added as part of the process of referring a service, or when referring a client to another agency.

Setting consent on a child's record

When adding a consent to a child's record, you will be asked two additional questions.

- Who granted consent? (e.g. Guardian, Child Protection Agency, other)
- Name of that person

Add consent

Benny Hepburn			
Client number	55687959 (Casual)	Date of birth	20/11/2004 (10)
Lead agency	Eastern Adelaide Generic Homelessness Service		
Information sharing			
Date granted	27/04/2015		
Granted at	Eastern Adelaide Generic Homelessness Service		
Granted by *	Guardian ▼		
Name *	Audrey Hepburn		
Consent type *	Verbal ▼		
Client agreement *	No ▼		
Expiry date *	27/10/2015  dd/mm/yyyy		
Agency type *	Within H2H (NAHA) ▼		
Consented agencies *			 Lookup agency
 Save	 Cancel		

The below chart sets out what is visible based on the setting of consent, by where you are in the client pathway.



Consent and information sharing in H2H – Lead and consented agencies

	Lead agency	Consented agency manager	Consented agency other user roles	Non-consented agency
Client Menu				
Client Summary	✓	✓	✓	✓
Personal Details	✓	✓	✓	
Contact Details	✓	✓	✓	
Income	✓	✓	✓	
Housing	✓	✓	✓	
Risk assessment scores	✓	✓	✓	
Client notes – view/add/delete	✓	✓	✓	
Assignments	✓			
Alerts	✓	✓	✓	✓
Consents	✓	✓	✓	✓
Client pathway	✓	✓	✓	✓
Refer Client	✓			
Referral History	✓			
Unassisted History	✓	✓	✓	✓
INTAKE				
View completed intake	✓	✓	✓	
Services – view	✓	✓	✓	
Services – add provided	✓	✓	✓	
Services – add referred, unmet need	✓			
Presenting Unit view	✓	✓	✓	✓
ASSESSMENT				
View completed Assessment	✓	✓	✓	
CASE PLAN				
Cover page – view	✓	✓*	✓**	
Case notes – view/add/delete	✓			
Service notes – view/add/delete	✓	✓*	✓**	
Life domains – view	✓	✓*	✓**	
Issues – view	✓	✓*	✓**	
Issues – add/edit/close	✓			
Services – (provided) add, edit, close	✓	✓*	✓**	
Services – (referred or unmet need) add, edit, close	✓			
* The ability to view/edit this information is based on an existing service referral having been sent and accepted ** The ability to view/edit this information is based on worker assignment and access level and for consented agency workers, based on assignment by their manager and access level				

The client pathway

Each client created in H2H starts a client pathway. The client pathway is a record of when and where a client has accessed a specialist homelessness service. An example of a client pathway is shown below.

Client pathway

Jenny Bloggs  					
Client number	55666794 (Active)	Date of birth	1/5/1952 (62)		
Lead agency	Outer Southern Generic Homelessness Service				
Results: 1-6 of 6					
Date created ▾	Pathway	Agency	Reference	Date	Status
09/10/2012	<u>Case plan</u>	Outer Southern Generic Homelessness Service	5566828		In progress
09/10/2012	<u>Assessment</u>	Outer Southern Generic Homelessness Service	100955	09/10/2012	Closed
01/05/2012	<u>Intake</u>	Outer Southern Generic Homelessness Service	921	09/10/2012	Closed
07/10/2011	Case plan	Together 4 Kids Child Focussed Support	5566424	07/10/2011	Closed
07/10/2011	Assessment	Together 4 Kids Child Focussed Support	100492	07/10/2011	Closed
07/10/2011	Intake	Together 4 Kids Child Focussed Support	655	07/10/2011	Closed
◀ Previous Page: <input type="text" value="1"/> Next ▶					

A person should only ever have one client record for the life of their involvement with the South Australian SHS sector. Duplicate client entries interrupt the client pathway and impact recording of a client’s journey through the homelessness sector.

Historical information can be accessed from the client pathway. An underlined pathway entry of ‘intake’, ‘assessment’ or ‘case plan’ can be clicked on to view that pathway item, where you can view information that was entered.

Where appropriate consents exist, the following historical information can be viewed for each item¹;

Historical information visible through client pathway	
Intake	View intake information (cover page), and view all services provided or referred including all detail, and copy of pdf referral form for referred services
Assessment	View cover page and assessment details
Case plan	View cover page, case notes, plan summary, exit information and full case plan issues, issues and services

¹ Some items may be visible only to users with Agency Manager access level

The 'Status' column in the client pathway can also give you information about how the intake, assessment or case plan progressed;

Pathway item status definitions	
In progress	Pathway item (e.g. intake, assessment or case plan) has been created, and is still in progress with the listed agency
Closed incomplete	An intake was closed while it was in progress, either by an in-progress intake closed by system close or adding an 'unassisted' to the record.
Complete	The item was saved and completed (only applicable to intake or assessment)
Closed complete	The client record was closed off by daemon or end support after the item had been completed (applicable only to intake or assessment)
Closed	The client has moved on to the next pathway item, or a case exit has been completed. (e.g. after saving and completing an intake, the status will be 'complete' if the user then creates an assessment, the intake status will change to 'closed')

Refer client

One of the primary functions of H2H is to facilitate the "No wrong door" principle, where a client can present at any SHS in South Australia and be directed to the most appropriate agency for support, according to their individual circumstances. The Refer Client function enables an electronic referral to the appropriate agency, reducing the need for the client to provide their information repeatedly.

Note: a client record cannot be referred to a new agency unless an intake has been completed. See the intake section for instructions.

How to refer a client

To refer a whole client record to another specialist homelessness service, follow the steps as outlined below;

Open the client menu and select the 'Refer client' menu. A client must have a status of either 'Casual' or 'Assessed' to be referred to another lead agency.

Client

- Client summary
- Personal details
- Contact details
- Income
- Housing
- Notes
- Assignments
- Alerts
- Consents
- Client pathway
- Refer client**
- Referral history
- Unassisted history


Intake

Assessment

Case plan

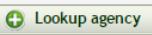
End support

Add client referral

Deborah Jones 

Client number 55689809 (Casual) **Date of birth** 15/07/1967 (48)

Lead agency Eastern Adelaide Generic Homelessness Service

Referral type * Within H2H (NAHA) 

Receiving agencies
No agencies have been selected.

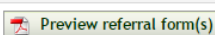
Date of referral * 5/11/2015 dd/mm/yyyy

Primary reason *

Secondary reason

Transport required

Client request

Send referral Cancel 

Select the 'lookup agency' button



In the Lookup agency pop up, select the region, and the agency within that region that the client is being referred to.

Lookup agency

Region *

- Adelaide Hills
- Eastern Metro**
- Eyre and Western



<input type="checkbox"/> Agency	Region
<input type="checkbox"/> Aspire Extension Program	Eastern Metro, Northern Metro, Southern Metro, Western Metro
<input type="checkbox"/> Bramwell House - Adelaide Domestic Violence Crisis Accommodation Service	Eastern Metro, Statewide DFV Alliance
<input checked="" type="checkbox"/> Catherine House	Adelaide Hills, Eastern Metro, Eyre and Western, Far North, Fleurieu and KI, Limestone Coast, Murray Mallee, Northern Metro, Southern Metro, Western Metro, Yorke and Mid North, Adelaide South Alliance, Adelaide North Alliance, Country South Alliance, Country North Alliance, Statewide DFV Alliance

Once the agency has been selected, click the *select agency* button (shown above) to return to the add client referral screen, and complete the remaining fields.



Warm referrals: where possible the user should also ensure that they have contacted the new agency to discuss the referral prior to sending on H2H. This ensures the receiving agency has all the information required in order for them to accept the referral and provide the client with the services they require.


Add client referral

Jason Brown  

Client number 55686587 (Casual) Date of birth 02/01/1999 (16)
Lead agency Eastern Adelaide Generic Homelessness Service

Referral type * Within H2H (NAHA) ▾ + Lookup agency

Receiving agencies			
Agency	Regions	Contact person	Contact details
Eastern Adelaide Youth Homelessness Service	Eastern Metro	Brook Stevens	Email: EAYHSReferral@syc.net.au Phone #: 1300306046 +  



Date of referral * 20/03/2015  dd/mm/yyyy


Primary reason * Short-term or emergency accommodation ▾


Secondary reason Jason presented to the Generic service but as he is 16 he would be better supported through a youth specific service. Jason requires assistance with finding accommodation as he is unable to return home

Transport required Jason has been provided with a bus ticket to assist him in getting to the youth service office

Client request

+ Send referral  Cancel + Add consent(s)  Preview referral form(s)

Note: if the wrong agency has been accidentally selected it can be removed from the receiving agencies list by selecting the  icon. This can be done before or after consent has been added.

Before the referral can be sent, consent must be added. To add consent, select either the  icon in the receiving agencies box, or alternatively, select the 'Add Consent (s)' button at the bottom of the screen.

The Add consent popup will then appear;

Add consent

Date granted 20/03/2015

Granted at Eastern Adelaide Generic Homelessness Service

Consent type * Verbal ▾

Client agreement * Yes ▾

Consented agencies • Eastern Adelaide Youth Homelessness Service

Expiry date * 20/09/2015 dd/mm/yyyy

Save Cancel

Once the consent has been saved, the receiving agency has been confirmed, the add consent button will no longer be displayed. The referral can now be sent.

Add client referral

Kofi Ansah

Client number 55769419 (Casual) Date of birth 10/07/1980 (45)

Lead agency H2H Generic Training East

Referral type * Within H2H (NAHA) ▾

Receiving agencies

Agency	Regions	Contact person	Contact details
Aspire Extension Program	Eastern Metro Northern Metro Southern Metro Western Metro	Tameka Thompson	Email: aspire@huttstcentre.org.au Phone #: 8418 2590 <i>Please contact the agency prior to making this referral</i>

Date of referral * 20/04/2026 dd/mm/yyyy

Primary reason * Short-term or emergency accommodation ▾

Secondary reason Kofi presented to the generic service but has recently been working with Hutt St through the Aspire program, referring Kofi to Aspire for support.

Transport required Kofi has been provided with a bus ticket to travel to Hutt St Centre

Client request

Send referral Cancel Add consent(s) Preview referral form(s)

Note: the referral can be previewed before sending by selecting the pdf icon or the Preview referral form(s) button.

On selection of the 'send referral' button, the receiving agency will receive an email to the prefilled email address, to alert them that a client referral has been received, and request that they either accept or reject the referral. See the '[Agency manager section](#)' for further detail on accepting and rejecting referrals.

The details of the referral will now display;
Client referrals

Jason Brown ! ♀

Client number 55686587 (Casual) **Date of birth** 02/01/1999 (16)

Lead agency Eastern Adelaide Generic Homelessness Service

Date of referral 20/03/2015 **Referral number** 10712

Primary reason Short-term or emergency accommodation

Secondary reason Jason presented to the Generic service but as he is 16 he would be better supported through a youth specific service. Jason requires assistance with finding accommodation as he is unable to return home

Transport required Jason has been provided with a bus ticket to assist him in getting to the youth service office

Referral type Within H2H (NAHA)

Receiving agency Eastern Adelaide Generic Homelessness Service

Agency	Contact person	Emails	Status
Eastern Adelaide Generic Homelessness Service	Eastern Metro Brook Stevens	...@shsync.net.au	Pending

Client remains with current lead until referral has been accepted

The referral can be withdrawn if needed

View the pdf notification that was emailed to the receiving agency

Referral history

The referral history screen is only visible to the current lead agency. The referral history screen in the client menu will display all historical client referrals, whether accepted, rejected or pending;

- Client
- Client summary
- Personal details
- Contact details
- Income
- Housing
- Notes
- Assignments
- Alerts
- Consents
- Client pathway
- Refer client
- Referral history**
- Unassisted history
- Intake
- Assessment
- Case plan
- End support

Referral history

Michaela Allen ♀

Client number 55684200 (Casual) **Date of birth** 19/05/1981 (33)

Lead agency Limestone Coast Generic Homelessness Service

Results: 1-4 of 4

Referral history	Referring agency	Receiving agency	Status	Reason for rejection
02/04/2015 (Client) Reference #: 10714 Status: Rejected Primary reason: Other housing/accommodation	Eastern Adelaide Generic Homelessness Service	Outer Southern Generic Homelessness Service	Rejected	Agency was in the wrong area
09/04/2014 (Client) Reference #: 10530 Status: Accepted Primary reason: Short-term or emergency accommodation	Outer Southern Generic Homelessness Service	Eastern Adelaide Generic Homelessness Service	Accepted	

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Historical referral details and pdf referral forms can be viewed by selecting the referral from the list to open.

Unassisted history

Allows you to view all occasions where a client has been unable to be assisted by a SHS and add a new unassisted event. Use the unassisted function if the client has presented but leaves or disengages before being provided with a service. Read on for detail on how to add an unassisted record. The unassisted history screen can be viewed by all users of H2H.

Add unassisted

The AIHW defines an unassisted person as:

'any person who seeks services from a specialist homelessness agency and does not receive any services. Services include the provision, referral or assessment of needs...'

The *save as unassisted* option can be found in 3 places within H2H:

1. At the bottom of the *client details* page when adding a new client.
2. On the *unassisted history* page within the client menu, (only available if no services or assessment has been added).
3. On the *services* page within the intake menu (only available if no services or an assessment has been added).

Selecting the *save as unassisted* button will direct you to the 'Add unassisted client: unassisted details' screen; where you are required to complete the fields shown below;

The screenshot shows the 'Add unassisted client: unassisted details' form. The header includes the 'homeless HOME Training' logo and 'Outer Southern Generic Homelessness Service'. The breadcrumb trail is 'Client > Add unassisted client: unassisted details'. On the left is a 'Client' menu with options like 'Client summary', 'Personal details', 'Contact details', 'Income', 'Housing', 'Notes', 'Assignments', 'Alerts', 'Consents', 'Client pathway', 'Refer client', 'Referral history', and 'Unassisted history'. The main form area is titled 'Add unassisted client: unassisted details' and contains the following fields:

- Client name:** John Smith (with a gender icon)
- Client number:** 55677981 (New)
- Date of birth:** 05/05/1983 (30)
- Lead agency:** Outer Southern Generic Homelessness Service
- Request date *:** 25/06/2013 (calendar icon) dd/mm/yyyy
- Service requested *:** Short-term or emergency accommodation
- When required? *:** Within 24 hours
- Reason not provided/referred *:** Lost contact with client
- Additional notes:** John disengaged after initial contact and I have been unable to contact him again

At the bottom of the form are two buttons: 'Save and continue' and 'Cancel'.

You would use the unassisted function where the client did not accept the assistance offered, disengaged or lost contact with client after commencing a new client record, or where an intake was completed but the client received no services or referrals.

Once the *save and continue* button is clicked the client status becomes *unassisted*. No further support can be entered on the client's record until the client is reactivated by completing a new Intake.

Unassisted vs inactive: functionally, the unassisted status is the same as inactive. Both indicate that the record is closed and require a new intake to be re-opened again.

Where the unassisted was created by another agency, the following is visible;


homeless HOME Training Riverland Generic Homelessness Service

Client > Unassisted history

Client

- Client summary
- Consents
- Client pathway
- Unassisted history
- Intake**

Unassisted history

Samuel Green 

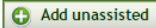
Client number 55687355 (Unassisted) **Date of birth** 30/11/1984 (30)

Lead agency Eastern Adelaide Generic Homelessness Service

Results: 1-2 of 2

Service requested	Reason not provided/referred	Agency	Request date	When required
Short-term or emergency accommodation	No accommodation available	Eastern Adelaide Generic Homelessness Service	02/04/2015	Within 24 hours
Short-term or emergency accommodation	Client did not accept service	Eastern Adelaide Generic Homelessness Service	16/02/2015	Within 24 hours

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The agency that created the unassisted record will be able to access the record and view any additional information that was entered at the time. For example;

View unassisted details

Jelly Bean (Gel) 

Client number 55767477 (Unassisted) **Date of birth** 07/1976 (49)

Lead agency NPY Women's Council Domestic and Family Violence Service


Request date 20/04/2026

Service requested Short-term or emergency accommodation

When required? Within 24 hours

Reason not provided/referred No accommodation available

Additional information client refused offer of support to locate appropriate private rental accommodation, stating that if they could not be provided with accommodation then there was nothing else they wanted from the agency



homeless²HOME

THE INTAKE MENU

Intake

The period of time that a client receives assistance from your agency is referred to as a support period, and completing an intake is how the support period starts.

Throughout the intake, you will enter information about the client's situation both at presentation to your agency, and the week before presentation. Client outcomes are assessed by using the information you provide about the client at intake, compared to information about the client when you complete an [end support or case exit](#). Missing information or 'don't know' responses mean that it may not be possible to determine if the client situation has improved as a result of working with your agency, so it is very important for you to ensure the client intake is filled out as completely as possible.

Notice of information provision

The first step in starting an intake is completing the *Notice of information provision* (NOIP) panel.

Client ▾

Intake ▲


- Cover page
- Presenting unit
- Services

Assessment ▾


Case plan ▾


End support ▾


Add intake: cover page

Marcus Simpson 


Client number 56680515 (Unassisted) **Date of birth** 26/12/1987 (38)


Lead agency Terrace Boarding House Liaison Worker 


 There is no current intake for this client
To begin a new intake, use the 'Add intake' button below

 **Notice of information provision**
Preview the information provision PDF notice to print a copy. [Preview notice in new window](#)

Notice of information provision

Notice advised? * 

Date advised *  dd/mm/yyyy

 **Add intake**

This is a mandatory step, and no other intake panels appear until this section is complete. Before client support details can be entered onto H2H, the client must be advised (either verbally or in writing) of the details contained in the NOIP. See the following page for a copy of the NOIP. Indicating that the NOIP has not been provided by selecting 'no', will prevent you from creating an intake. It is your responsibility as a worker to ensure that the client understands what information is being collected, and how it will be used.

The NOIP can be previewed via the link in H2H, and can be accessed on the H2H support page (by clicking the H2H support link at the bottom of every page of H2H).

Once a response has been provided to indicate the NOIP has been advised to the client and the date that occurred on, click the *add intake* button to continue the intake. You will be presented with eight panels to complete to finalise the intake.

NOTICE OF INFORMATION PROVISION

The information in this form must be given to clients when they present for services (can be provided verbally). This is a mandatory requirement. You must indicate that the client has been given this information in the H2H client and case management system.

I (*client name*)..... understand that:

- I have to give personal information to receive a service
- my personal information will be kept confidential, and will only be seen by people authorised to see it
- my informed consent will be asked for before my personal information is shared with anyone else, and respected in all situations except if any of the below apply:
 - the agency is obliged by law to disclose my information regardless of consent or otherwise - eg an Act of Parliament, a Court Order
 - the agency is authorised under the State Government's Information Privacy Principles¹ or Information Sharing Guidelines²
 - it's unsafe or impossible to get my consent
 - it's anticipated that a child, young person or adult will be at risk of serious harm, abuse or neglect, or pose a risk to their own or public health or safety if the information isn't shared.
- my personal information will only be used to:
 - assess the services I may need and develop a plan to provide them to me for the time that I need them
 - provide other Agencies I might present to with relevant information about me, to minimise the need to keep explaining my situation.
- information about me that doesn't personally identify me will be used to both:
 - better plan and coordinate the overall services in general
 - meet funding and reporting requirements.
- I can access my personal information by asking any Agency I am dealing with.

Date..... Client Signature:.....

Tick if verbal approval was provided rather than written


¹ Available at <https://www.dpc.sa.gov.au/resources-and-publications/premier-and-cabinet-circulars/DPC-Circular-Information-Privacy-Principles-IPPS-Instruction.pdf>

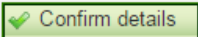
² Available at https://www.dpc.sa.gov.au/_data/assets/pdf_file/0009/45396/Information-Sharing-Guidelines.pdf

How the intake works

The intake is divided up into a series of panels. If the client record has a status of new (an intake has never been completed before) then most panels will have no information entered. If the client has engaged with the homelessness sector before, then some panels will contain information for review and update.

These panels can be expanded and collapsed by clicking on the + or – symbol in the top right-hand corner of each panel (as shown below).



Once all mandatory fields in the panel have been completed, the  button becomes available at the bottom of the panel.

Once this button is clicked the panel changes to a *view mode*. In view mode the details cannot be edited, and a green tick appears in the top right-hand corner (as shown below). You are then automatically directed to the next panel. If you need to edit any of the details within a panel that has been confirmed, you can click the *edit* button in the top right-hand corner. This will then change the panel back to edit mode, so you can change details.



	Presenting	Week before
Formal education /training	Yes	Yes
Education type	University student	University student
Enrolment status	Enrolled but not attending	Not recorded
Facility		Not recorded

Once all panels are complete (all panels have a green tick in the top corner) the *Complete intake* button will be available at the bottom of the page.



Note: if this button is greyed out, it means one or more panels have not been completed.

Intake details panel

The first panel is the *Intake details* panel. This is where information is recorded about how the client came to your agency and their homelessness history. This panel is broken up into two sections, access questions, and homelessness history questions;

The screenshot shows the 'Intake details' panel with two main sections. The top section, labeled 'Access questions', includes fields for 'Date of intake *' (24/05/2013), 'Time *' (03:29 PM), 'Access type *' (Self-referral), and 'Access method *' (Telephone). The bottom section, labeled 'Homelessness questions', includes two sets of checkboxes for 'Homelessness type in last month' and 'Homelessness type in last 12 months', both with options: 'Sleeping rough or in non-conventional accommodation', 'Short term or emergency accommodation, due to a lack of other options', 'Not homeless', and 'Don't know'. There is also a 'Homeless more than 12 months ago *' dropdown menu and a 'Confirm details' button at the bottom.

Access questions

You are required to enter a date and time of intake. The date of intake can be backdated to an earlier date providing that:

- The date is within the current month,
- The intake date is not before the date of first contact

Next, specify the access type and access method. The access type is how the client presented to your agency. The Access method is how initial contact was made with your agency. Definitions of when to use the different responses are outlined below.

Access type definitions	
Self-referral	The client approached the agency without any referral from any other person or agency.
Family/Friend referral	The client heard about the agency from a family or friend, or a family/friend contacted on the client's behalf.
Formal Referral	Another worker, group, or organisation formally referred the client to your agency. This may have been another NAHA service or a non-NAHA service.
No formal referral	The client obtained your agency details from another worker, group or organisation, but contacted your agency themselves and there was no contact from the other worker, group or organisation.
Other - specify	Any other form of referral that does not fit in the above categories.
Don't know	The client does not know or is unable to tell you how they came to access your agency.

Access method definitions	
Walk in	The client has presented to the agency with no preceding phone call or booked appointment time.
Telephone	The client has contacted the agency themselves via telephone.
Third Party	Someone has contacted the agency on the client's behalf i.e. they may have been referred by the courts, police, or a friend or family member.
Outreach	The first contact with the client occurred not in an office setting, e.g. an agency that runs an outreach session at a community centre, or a client who approaches whilst a worker is on a home visit with an existing client.
Assertive Outreach	This access method should only be selected by agencies that are funded to provide assertive outreach and have contacted the client through an assertive outreach program.
Early Intervention	The first contact with the client occurred prior to them becoming homeless, e.g. at a group session, through a school's program etc.

Homelessness questions

The last three questions in the intake details panel are in relation to the client's homelessness history. You will need to enter if the client has been homeless, and the type of homelessness, within the last month, 12 months or more than 12 months ago. It is important to note that client circumstances may require selection of more than one of the options provided in the 'one month' and '12 month' categories.

Homelessness type definitions	
Sleeping rough or in non-conventional accommodation	The client has been living on the streets, sleeping in parks, squatting, staying in cars or railway carriages, living in improvised dwellings or living in the long grass.
Short-term or emergency accommodation, due to a lack of other options	The client has been living in any of the following situations; <ul style="list-style-type: none"> - Refuges - Crisis shelters - Couch surfing - Living temporarily with friends and relatives - Insecure accommodation on a short-term basis - Emergency accommodation arranged in hotels, motels etc. by a specialist homelessness agency
Not Homeless	The client has not been homeless within the last month/12 months.
Don't Know	The information is not known, or the client has refused to provide the information.

Note: the following short-term accommodation options are **not** considered to be homeless;

- *Hotels, motels, caravan parks and other temporary accommodation used when a person is on holiday or travelling.*
- *Custodial and care arrangements, e.g. prisons or hospitals.*
- *Temporary accommodation used by a person while renovating their usual residence or building a new residence (for example, weekends, caravans).*

You will notice that if you select a homelessness type in the last month, H2H will pre-fill that information into the *last 12 months* category. For example;

The screenshot shows a survey form with two sections. The first section is titled "Homelessness episodes in last month - select option(s) that apply below *". It contains four radio button options: "Sleeping rough or in non-conventional accommodation" (checked), "Short term or emergency accommodation, due to a lack of other options", "Not homeless for entire month", and "Don't know". The second section is titled "Homelessness episodes in last 12 months - select option(s) that apply below *". It contains the same four radio button options, with the first one also checked. A red callout box points to the first checked option in the second section, containing the text: "Selecting the check box above has automatically selected the same for the next question". Below the second section is a label "Homeless more than 12 months ago *" followed by a yellow dropdown menu.

This is because the last 12 months is inclusive of the last month, therefore if a person was homeless in the last month, then they were by default homeless in the last 12 months.

When answering the question regarding a client's homelessness more than 12 months ago, your answer will be 'yes' if the client has been homeless at any time in their life up until 12 months ago.

The housing panel

Within the housing panel, you will be required to enter specific information regarding the clients housing history, housing details at the time the client presented to your agency and a week before the client presented to your agency. Information is also collected regarding history of stays in facilities in the last 12 months.

Housing

What was the client's last permanent address? *

Don't know
 No permanent address
 Select last permanent address

Permanent addresses + Add address

Address	Housing type	Moved in	Moved out	Perm	Current
<input type="radio"/> 37 First Avenue, GLENUNGA SA 5064	House/townhouse/flat	01/05/2018	30/09/2018	Yes	<input type="checkbox"/>
<input type="radio"/> Port Noarlunga Foreshore Car Park, PORT NOARLLUNGA SA 5167	Motor vehicle	04/01/2019			<input type="checkbox"/>

Time since at permanent address *

What is the client's address at presentation and a week before? *

P WB

Don't know
 Select recent address

Recent addresses + Add address

P	WB	Address	Housing type	Moved in	Moved out	Perm	Current
<input type="radio"/>	<input type="radio"/>	Port Noarlunga Foreshore Car Park, PORT NOARLLUNGA SA 5167	Motor vehicle	04/01/2019			<input type="checkbox"/>
<input type="radio"/>	<input type="radio"/>	37 First Avenue, GLENUNGA SA 5064	House/townhouse/flat	01/05/2018	30/09/2018	Yes	<input type="checkbox"/>

Housing details at presentation

Housing type: House/townhouse/flat

Tenure *:

Conditions of occupancy *:

Living arrangements *:

Housing details a week before

Housing type: Boarding school/residential college

Tenure *:

Conditions of occupancy *:

Living arrangements *:

Has the client been in any of the following facilities in the last 12 months? *

Don't know
 No
 Yes - select all options that apply below

List of facilities

- Disability support
- Hospital (excluding psychiatric)
- Psychiatric hospital/unit
- Rehabilitation
- Adult correctional facility
- Youth/juvenile correction centre
- Immigration centre

The first information required is in relation to the client's last permanent address.

Permanent address: an address in a conventional dwelling, where the client had some form of tenure, and resided at for at least 3 months.

Any addresses previously saved on the client housing record from previous support periods or added in the *add client* process will automatically appear in the housing tables within this panel.

Housing

What was the client's last permanent address? *

Don't know
 No permanent address
 Select last permanent address

1. Select the relevant radio button

2. If needed, select this button to add a new address to the list

Permanent addresses

Address	Housing type	Moved in	Moved out	Perm	Current
<input checked="" type="radio"/> 37 First Avenue GLEN...	House/townhouse/flat	01/05/2018	30/09/2018	Yes	
<input type="radio"/> Port Noarlunga Po PORT NOARLUNGA	Motor vehicle	04/01/2019		Yes	

3. If the last permanent address is already in the list, select it using the radio button

4. Select how long it has been since the client lived at their last permanent address

Time since at permanent address *

If you need to add a new address to the housing panel, click the button. The following popup will appear;

Add address

Housing type *

Tenure *

Conditions of occupancy *

Living arrangements *

Property details

Unit number

Street number

Street name Street type

Suburb *

State * Post code *

Country *

Permanent Current

Date moved in * Date moved out

Complete all mandatory fields as required.

Selecting the icon will bring up the 'Find a suburb' tool, where you can search for all or part of a suburb name, or select the checkbox to search all Australian suburbs. For example, a search for suburbs containing the word 'Green' would appear as follows;

Find a suburb

Enter all or part of the suburb name to filter your search.

Include all Australian suburbs

Search Results		Suburbs: 1 - 9 of 9
Suburb	Postcode	State
GREENACRES	5086	SA
GREEN FIELDS	5107	SA
GREENWITH	5125	SA
GREEN HILLS RANGE	5153	SA
GREENBANKS	5253	SA
GREENHILL	5140	SA
GREENWAYS	5272	SA
GREENOCK	5360	SA
GREEN PATCH	5607	SA

◀ Previous | Page: 1 | Next ▶

You can select the correct suburb with a single click anywhere on the search result line.

Once selected the suburb name, state and postcode will be entered into the address.

Add address

Housing type *

Tenure *

Conditions of occupancy *

Living arrangements *

Property details

Unit number

Street number

Street name Street type

Suburb *

State * Post code *

Country *

Permanent Current

Date moved in * Date moved out

For each address you can also indicate whether this address was a permanent address (*Tenure in a conventional dwelling for at least 3 months*), and/or the current address (*select to indicate if this*

is the client's current living situation). Once all mandatory fields have been completed the address can be saved. The address will then appear in the housing panel.

Address	Housing type	Moved in	Moved out	Perm	Current
Unit 6 / 27 Bramble Terrace, GREEN FIELDS SA 5107	House/townhouse/flat	29/10/2018		Yes	Yes

If you notice a mistake is made when adding an address, or an address previously entered is incorrect you can edit it by clicking on the pencil icon in the corresponding row.

Note: an address that has been used in previous intakes cannot be edited. This will be indicated by a greyed-out edit pencil.

Next, you are required to enter the address at *presentation* to your agency and a *week before* presentation. You will notice the two columns of radio buttons to select that correspond to *presenting (P)* and *week before (WB)*. Select the correct addresses from the 'most recent address' table or add an address if required by clicking the *add address* button and completing the pop-up box as shown above.

Note: information about address at presentation is extremely important. The 'house type' field is used to establish whether a client was homeless at the time they first presented to your agency or not. A 'don't know' response to this question will result in unknown housing status at the start of support.

What is the client's address at presentation and a week before? *

P **WB**
 Don't know Select recent address

P	WB	Address	Housing type	Moved in	Moved out	Perm	Current
<input checked="" type="radio"/>	<input type="radio"/>	Port Noarlunga Foreshore Carpark, PORT NOARLUNGA SA 5167	No dwelling/street/park/in the open	17/04/2026		Yes	
<input type="radio"/>	<input checked="" type="radio"/>	27 First St GLENUNGA SA 5064	House/townhouse/flat	01/01/2026	16/04/2026		

[+ Add address](#)

Next you will be required to confirm the tenure, conditions of occupancy and living arrangements, firstly for the address at presentation and then for the week before address (as shown on next page). All these fields are prefilled from the address when you select it with the radio buttons

Housing details at presentation	
Housing type	House/townhouse/flat
Tenure *	Renter - Private housing
Conditions of occupancy *	Leased tenure - nominated on lease
Living arrangements *	Lone person
Housing details a week before	
Housing type	No dwelling/street/park/in the open
Tenure *	No tenure
Conditions of occupancy *	Other
Living arrangements *	Lone person

Confirm the displayed information is correct, especially if using an existing address.

Definitions for tenure, conditions of occupancy and living arrangement responses can be found below, or in the Specialist Homelessness Services Collection Manual.

Tenure type collects information on whether a dwelling is owned or rented, or whether the client was living there rent-free. It also provides more detailed information on emergency accommodation – including whether a client is paying a fee or not.

Tenure type definitions	
Renter – private housing	A client renting a dwelling owned by a private individual(s) or a private business. It is NOT owned by a government body or a housing association, housing cooperative or other not-for-profit community service organisation
Renter – public housing	A client renting a dwelling owned/controlled by a government body or government authority
Renter – community housing	A client renting a dwelling owned/controlled by a housing association, housing cooperative or other not-for-profit community service organisation
Renter – transitional housing	A client renting accommodation provided through a government-funded agency. The accommodation is generally more stable and provided for longer than crisis accommodation, and is linked to external support through an agency
Renter – caravan park	A client renting a cabin or caravan in a caravan park
Renter – boarding/rooming house	A client renting a room or rooms in a boarding or rooming house

Renter – emergency accommodation/night shelter/women’s refuge/youth shelter	A client paying rent for emergency accommodation, a night shelter, women’s refuge or youth refuge
Other renter	A client renting accommodation that is not included in the categories above
Rent free-private housing	A client staying rent free at a dwelling owned by a private individual(s) or a private business. It is NOT owned by a government body or a housing association, housing cooperative or other not-for-profit community service organisation
Rent free – public housing	A client staying rent free at a dwelling owned/controlled by a government body or government authority
Rent free – community housing	A client staying rent free at a dwelling owned/controlled by a housing association, housing cooperative or other not-for-profit community service organisation
Rent free – transitional housing	A client staying rent free at accommodation provided through a government-funded agency. The accommodation is generally more stable and provided for longer than crisis accommodation, and is linked to external support through an agency
Rent free – caravan park	A client staying rent free in a cabin or caravan in a caravan park
Rent free – boarding rooming house	A client staying rent free in a room or rooms in a boarding or rooming house
Rent free - emergency accommodation/night shelter/women’s refuge/youth shelter	A client staying rent free in emergency accommodation, a night shelter, women’s refuge or youth refuge
Other rent free	A client staying rent free in accommodation that is not included in the categories above
Life tenure scheme	A client with a contract to live in the dwelling for the term of their life but without the full rights of ownership and usually with limited or no equity in the dwelling. This is a common arrangement in retirement villages
Owner – shared equity or rent/buy scheme	A client who is purchasing a proportion of the equity in the dwelling, and paying rent for the remainder
Owner – being purchased/with mortgage	The client owns their dwelling and is repaying a mortgage or loans secured against the dwelling, regardless of the purpose of the mortgage or secured loan
Owner –fully owned	The client owns their dwelling and is not making any payments on mortgages or loans secured against the dwelling. A client who has repaid a loan, but technically not discharged the associated mortgage

Other tenure type not elsewhere specified	A client with tenure that does not fit any of the above categories includes clients who are house sitting or receiving payment in kind for a specific service, such as a live-in nanny
No tenure	The client is sleeping rough or does not have a legal right to occupy a dwelling and can be asked to leave at any time Includes couch surfing, living on the streets, sleeping in parks, squatting, using cars or railway carriages, improvised dwellings, or living in the long grass Includes living in an institutional setting, such as a hospital, psychiatric hospital/unit, disability support unit, rehabilitation facility, adult correctional facility, youth/juvenile justice detention centre, boarding school/residential college, aged care facility or immigration detention centre
Don't know	The information is not known, or the client has refused to provide the information

The conditions of occupancy questions provide more detailed information about a client's tenure. For example;

- If the client was renting in public housing, was their name on the lease?
- If the client's tenure was rent free in public housing, were they couch surfing or living with a relative fee free?
- If a client has been living rough, select *not applicable* for conditions of occupancy

Occupancy condition definitions	
Leased tenure – nominated on lease	<p>A client who is renting and is listed on the contract for the lease</p> <p>A client who has tenure with a rent/buy scheme</p>
Lease in place – not nominated on lease	A client who is living in accommodation where a lease is in place, but the client is not named on the lease agreement
Couch surfer	A client who typically moves from household to household intermittently, who is not regarded as being part of those households, and who does not have any form of leased tenure over any accommodation
Boarder	A client who is boarding, and who is supplied with meals and/or lodging in return for payment
Living with relative fee free	<p>A client who is related to a member of a household, and who is not paying a fee for their lodging</p> <p>A child who is living with a parent who either owns or is renting the dwelling</p>
Other	A type of arrangement that is not listed in the categories above
Don't know	The information is not known, or the client has refused to provide the information
Not applicable	<p>A client has no tenure, and they are not a <i>couch surfer</i> or <i>living with a relative fee free</i></p> <p>A client's tenure is a life tenure scheme</p> <p>A client has no tenure where they have been living in an institutional setting</p> <p>A client who owns their own home</p>

Living arrangement information is used to indicate the group of people that the client lives with. You should record the category that best describes this group of people. This should not be confused with [the presenting unit](#). Children should be recorded as the group that best describes their situation; for example, if living with both parents, you would record *couple with child(ren)*

Living arrangement definitions	
Lone Person	The client lives alone. This includes living alone (without family) in an institution
One parent with child(ren)	The client is a single parent living with their child(ren) The client is a child living with a single parent includes step and adopted parent/child relationships
Couple with child(ren)	The client is a parent living with their spouse/partner and their child(ren) The client is a child living with both parents Includes step and adopted parent/child relationships
Couple without child(ren)	The client is living with their spouse/partner only
Other family	Includes all other groups with related individuals, including siblings and families of more than two generations
Group	Includes two or more unrelated persons who live together situations where boarders or lodgers live with a family excludes persons living alone (without family) in institutions
Don't know	Where you are unable to determine the living arrangements of the client

Once you have completed the presentation and week before housing information, the last question in the housing panel asks whether the client has previously lived in certain facilities in the last 12 months.



Has the client been in any of the following facilities in the last 12 months? *

Don't know
 No
 Yes - select all options that apply below

List of facilities

- Disability support
- Hospital (excluding psychiatric)
- Psychiatric hospital/unit
- Rehabilitation
- Adult correctional facility
- Youth/juvenile correction centre
- Immigration centre

If known, select as many as apply from the list provided. Once every question in the housing panel is completed, the *Confirm housing* button will become available. Click this to proceed to the next panel. The information entered will now be visible in a view mode.

Housing		Edit housing  	
	Presenting	Week before	Last permanent
Address	ADELAIDE SA 5000	17 Hutt Avenue, BROMPTON SA 5007	63 First Street, GLENUNGA SA 5064
Permanent			Yes
Housing type	No dwelling/street/park/in the open	House/townhouse/flat	House/townhouse/flat
Tenure	No tenure	Renter - Private housing	<i>Not recorded</i>
Conditions of occupancy	Other	Leased tenure - nominated on lease	<i>Not recorded</i>
Living arrangements	Lone person	Lone person	<i>Not recorded</i>
Time since at permanent address	<i>Not recorded</i>	<i>Not recorded</i>	More than 1 month, to 6 months ago
Facilities in the last 12 months	Adult correctional facility		

The income panel

Within the income panel, you will find a series of questions about your client's income and employment status. Like in the housing panel, you will again be asked to provide information relating to the client circumstances upon presentation(P) and week before presentation (WB).

The screenshot shows the 'Income' panel with the following sections:

- Does the client have a source of income? ***
 - P WB
 - Don't know
 - No
 - Yes - select income source
- Income details at presentation** (with a '+ Add income' button)
- Main source of income a week before *** (dropdown menu)
- Is the client registered for a government payment, but awaiting their first payment? ***
 - P WB
 - Don't know
 - No
 - Yes - date registered [] dd/mm/yyyy
- What is the client's labour force status? ***
 - P WB
 - Don't know
 - Not in the labour force
 - Unemployed
 - Employed
- What is the client's employment type? ***
 - P WB
 - Don't know
 - Part-time
 - Full-time
- Confirm income** (button)

Red brackets on the right side of the form group the first three questions under 'Income questions' and the last two under 'Employment questions'.

The first question asks if the client has a source of income at presentation and the week before. If you select yes, the income details field directly below this question becomes available. In this section you can add a source of income or edit a source if one already exists.

This is a close-up of the 'Income' panel, focusing on the 'Income details at presentation' section. The '+ Add income' button is circled in red.

If no income details currently exist, press the *Add income* button, and the following pop-up appears;

Edit income

Income - enter all that apply *

Government payments \$ Next due date

Employee income \$

Unincorporated business income \$

Workcover / compensation \$

Maintenance / child support \$

Other income \$

Total \$ 808.70

Government payments and allowances - select all that apply *

Age pension

Austudy / ABSTUDY

Carer allowance

Carer payment

Disability support pension (Centrelink)

Family Tax Benefit

Newstart allowance

Other government pension / allowance

Parenting payment

Sickness allowance

Youth allowance

DVA pension or payment

Main source of income *

Note: *income amounts entered are not collected for reporting purposes. The income amount can be estimated if you do not have an exact amount.*

Enter the relevant information and save. Once the pop-up has been saved, the income details will now be displayed in the income table as shown below:

Income details at presentation		
Main source	Other sources	Total Income
<input checked="" type="radio"/> Newstart allowance		\$808.70 fortnightly

Next you will need to indicate whether the client has already registered for a government payment but has not yet started receiving this payment. You will need to answer this question for both the clients' status upon Presentation to your agency, and week before presentation.

E.g. *For a client who has recently become unemployed, and has applied for a Newstart payment, but has not started receiving the payment yet, select yes, and enter the date the client first applied for the payment.*

Following this you will need to provide information on the client's labour force status (is the client employed) and what type of employment they are involved in (part time or full time). You will notice that the employment type question only becomes available if it is previously indicated that the client is employed.

What is the client's labour force status? *

P WB

Don't know

Not in the labour force

Unemployed

Employed

What is the client's employment type? *

P WB

Don't know

Part-time

Full-time

Whether a client is employed or not is an important indicator of socioeconomic status of a person, and a key element in measuring whether provided supports were able to improve the employment status of clients between start and end of support, an important outcome indicator.

Labour force definitions	
Employed	<p>Includes clients aged 15 years and over who during the reference week:</p> <p>a) Worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising 'Employees', 'Employers' and 'Own Account Workers').</p> <p>b) Worked for one hour or more without pay in a family business or on a farm (i.e. 'Contributing Family Worker'.)</p> <p>c) Were 'Employees' who had a job but were not at work and were:</p> <ul style="list-style-type: none"> • on paid leave • on leave without pay, for less than four weeks, up to the end of the reference week • stood down without pay because of bad weather or plant breakdown at their place of employment, for less than four weeks up to the end of the reference week • on strike or locked out • on workers' compensation and expected to be returning to their job, or • receiving wages or salary while undertaking full-time study. <p>d) Were 'Employers', 'Own Account Workers' or 'Contributing Family Workers' who had a job, business or farm, but were not at work.</p>

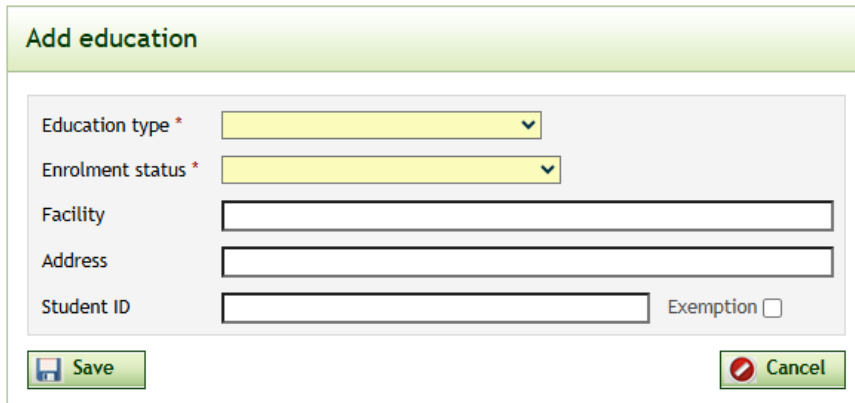
Unemployed	<p>Refers to clients who are aged 15 years and over, were not employed, and:</p> <p>a) Had actively looked for full-time or part-time work at any time in the four weeks up to the end of the reference week and were available for work in the reference week or would have been available except for temporary illness (i.e. lasting for less than four weeks to the end of the reference week).</p> <p>b) Were waiting to start a new job within four weeks from the end of the reference week and would have started in the reference week if the job had been available then.</p> <p>c) Were waiting to be called back to a full-time or part-time job from which they had been stood down without pay for less than four weeks up to the end of the reference week (including the whole of the reference week) for reasons other than bad weather or plant breakdown.</p>
Not in the labour force	<p>Refers to clients who were not employed or unemployed, as defined above.</p> <p>Includes clients who were keeping house (unpaid), retired, voluntarily inactive, permanently unable to work, in institutions (hospitals, gaols, sanatoriums etc.), trainee teachers, members of contemplative religious orders, and whose only activity during the reference week was jury service or unpaid voluntary work for a charitable organisation.</p>

Employment type definitions	
Full time	The client usually works 35 hours or more in a week.
Part time	Usually works less than 35 hours a week (in all paid jobs). (Link to the SHSC Collection Manual)

The education panel

The education panel collects basic information about your client's education and training status at *presentation* to your agency (**P**) and one *week before* presentation (**WB**). If you select 'yes' that your client is undertaking formal education or training, the education details panel becomes available.

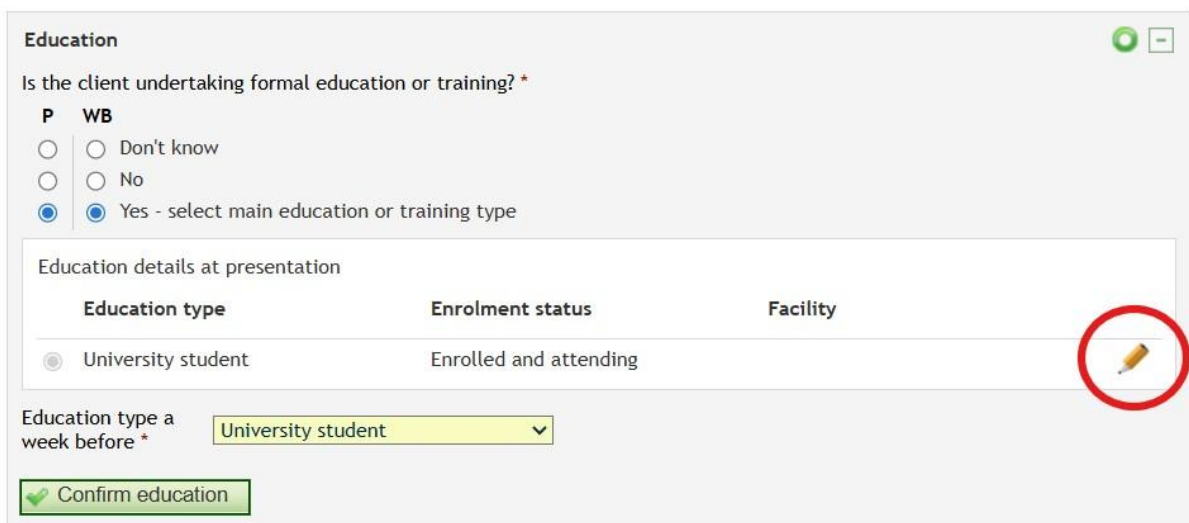
If no education details already exist for this client, click the *Add education* button within the panel. The 'add education' pop-up will then be displayed.



The 'Add education' pop-up form contains the following fields and controls:

- Education type * (dropdown menu)
- Enrolment status * (dropdown menu)
- Facility (text input field)
- Address (text input field)
- Student ID (text input field)
- Exemption
- Save button (with floppy disk icon)
- Cancel button (with red 'X' icon)

If education details already exist for this client, you can update them using the edit pencil icon as shown below.



The 'Education' panel includes the following elements:

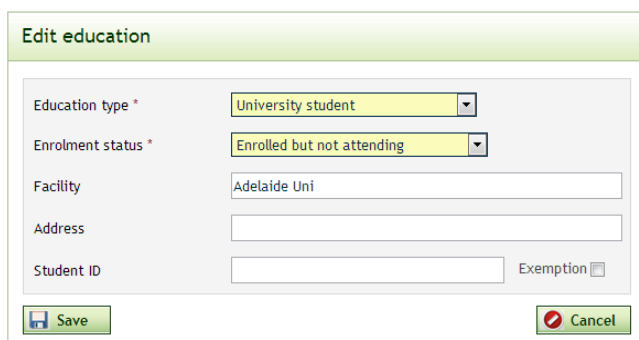
- Section title: Education
- Question: Is the client undertaking formal education or training? *
- Radio buttons for **P** and **WB** (Presentation and Week Before).
- Options: Don't know, No, Yes - select main education or training type (selected).
- Table: Education details at presentation

Education type	Enrolment status	Facility
University student	Enrolled and attending	

Below the table is a dropdown menu for 'Education type a week before *' with 'University student' selected. A red circle highlights a pencil icon in the top right corner of the table area, indicating the edit function.

At the bottom is a 'Confirm education' button with a green checkmark icon.

The 'Edit education' pop-up allows you to change education type, enrolment status and provide details of the facility and client's student ID number. The education details table within the education panel will automatically update to the latest client information that you enter here once the save button has been clicked.



The 'Edit education' pop-up form contains the following fields and controls:

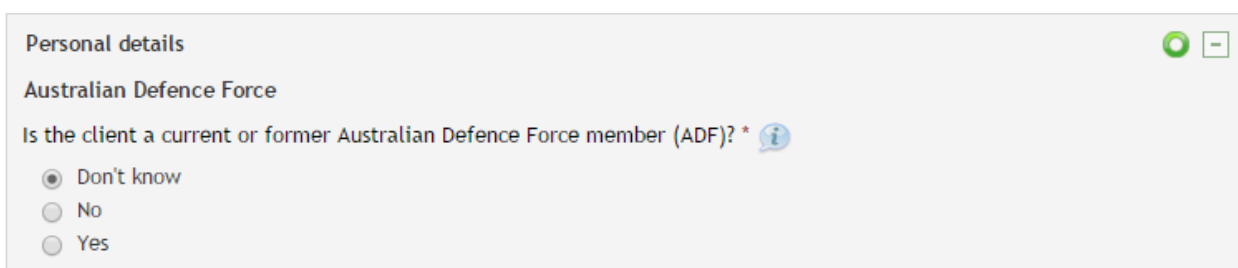
- Education type ***: A dropdown menu with 'University student' selected.
- Enrolment status ***: A dropdown menu with 'Enrolled but not attending' selected.
- Facility**: A text input field containing 'Adelaide Uni'.
- Address**: An empty text input field.
- Student ID**: An empty text input field.
- Exemption**: A checkbox that is currently unchecked.
- Save**: A green button with a floppy disk icon.
- Cancel**: A red button with a red 'X' icon.

The personal details panel

The personal details panel records information about Australian Defence force members (if the client is over 18 years of age), disabilities the client has, pregnancy (if previously selected), and care and protection orders (if the client is under 18 years of age).

Australian Defence Force

This panel relates to whether your client is a current or former Australian Defence Force member (ADF). This does not include non-Australian defence forces, or reservists who have never served full time in the ADF. Select a response of Yes, No, or don't know as applicable for your client.



The 'Personal details' panel includes the following section:


- Australian Defence Force**
- Is the client a current or former Australian Defence Force member (ADF)? *** (with an information icon)
- Don't know
- No
- Yes

Disability or Assistance

This panel relates to your clients' needs with self-care, mobility and communication, associated with a long-term health condition (e.g. severe asthma, depression), or a disability, that restricts everyday activities, and participation in the NDIS.

If you select 'yes' indicating your client has needs in one or more of these 3 areas, you will be required to select the level of difficulty your client experiences within each area.

Disability or assistance

Does the client need help or supervision with self-care, mobility or communication? * 

- Don't know
 No
 Yes

Self care *

Mobility *

Communication *


Details

Is the client currently receiving an agreed package of support through the NDIS? *

- Don't know
 No
 Yes

Recording disability or assistance for children: if the child is developing normally for their age (does not have a long term health condition or disability), 'Has no difficulty' should be recorded for the three areas.

If you select that a client under 14 needs assistance in any of the three areas, you will be prompted when saving the panel to confirm the question has been answered correctly.


 **Confirm: Review responses**

Is the response to the following question correct?:

- Client aged under 14 has been identified as needing help/supervision with self-care, mobility or communication due to a disability

Pregnancy questions

If your client's sex has been recorded as female or other-please specify, and you have indicated on the personal details page that your client is pregnant, a pregnant checkbox will appear. If ticked, it will open 3 questions about the client's pregnancy. *Note: the additional pregnancy fields are not mandatory.*

Pregnant	<input checked="" type="checkbox"/>
Due date	<input type="text" value="16/08/2013"/>  dd/mm/yyyy
Doctor	<input type="text" value="Dr Birth"/>
Doctor's address	<input type="text" value="111 Adelaide Rd, Modbury SA"/>

Care or protection order (under 18yrs only)

If your client is under the age of 18 you will need to record whether the client was under a care or protection order at presentation (P) and the week before (WB). If your client is under a care or protection order at presentation, click the *add care or protection order* button to enter details.

Care or protection

Is the client under a care or protection order? *

P **WB**

Don't know

No

Yes - select type of order

Care or protection order details at presentation

+ Add care or protection order

No details currently exist for this client

Type of order a week before *

A pop-up box will now appear. From this box select the type of order from the drop-down menu; enter any appropriate details and press 'Save'. The details will now be displayed in the Care or protection order table.

Add care or protection order

Type of order *

Details

Save **Cancel**

If you indicate the client was under a Care or protection order the week before presentation you will also need to indicate the type of order this was from the next drop-down menu.

Care or protection

Is the client under a care or protection order? *

P **WB**

Don't know

No

Yes - select type of order

Care or protection order details at presentation

Type of order	Details
<input checked="" type="radio"/> Residential care	client in residential facility in Seaford

Type of order a week before *

Confirm personal details

The health and wellbeing panel

The health and wellbeing panel captures information in relation to your client’s mental health.

If a ‘yes’ response is given to any of the 3 questions a corresponding question will be asked beneath.

Health & wellbeing 🔍

Is there any information, informal or formal, that indicates the client has a mental health issue? *

Don't know
 No
 Yes

Information provided by * Health professional

Has the client ever been diagnosed with a mental health issue by a health professional (eg. psychiatrist, psychologist or doctor)? *

Don't know
 No
 Yes

Details Not applicable

Has the client received services or assistance for their mental health issue? *

Don't know
 No
 Yes

What time period? * Currently receiving services

✔ Confirm health and wellbeing


The first question in the mental health section, should be answered from your perspective as agency worker, and can be based on your observation of the client. Definitions for the response options are below;

‘Information provided by’ definitions	
Agency worker	The client appears to the agency worker to have an undiagnosed mental health condition
Health professional	The client has been diagnosed with a mental health condition by a doctor, nurse, or other health professional
Non-government agency	Information is received from a non-government agency who offers disability support programs, or from a local community support program, whose target population includes those with a mental illness
Self-identified	The client reports that they have a mental illness but does not have contact with a specialised mental health service or other relevant service providers currently
Other	There is information to indicate that the client has a mental health condition, but the source of information is not included in the list above
No information indicating mental illness	There is no information available to the agency worker to indicate that the client <u>currently</u> has a mental health condition.

Contact details panel

When entering the contact details panel within intake, it may already contain pre-filled information. Any information already contained on the client record – on the 'contact details' page in the client menu is carried across to this panel. Any contact details entered in the *add client* page are also carried through to here.

If you have any pre-filled details entered on this page that are incorrect you can correct the information and press the *Confirm contact details* button.

Thomas Andrew (Tom)			
Client number	55767675 (Assessed)	Date of birth	01/01/1990 (36)
Lead agency	H2H Generic Training East 		
Contact details			
Phone #	<input type="text"/>	Mobile #	<input type="text" value="0439993338"/>
Email Address	<input type="text"/>		
Alternative contact			
Name	<input type="text"/>		
Phone #	<input type="text"/>	Mobile #	<input type="text"/>
Emergency contact			
Name	<input type="text" value="Jimmy Rees"/>		
Relationship	<input type="text" value="Uncle"/>		
Phone #	<input type="text"/>	Mobile #	<input type="text" value="0443335680"/>
Address	<input type="text"/>		

Presenting issues panel

The final panel within the intake is the presenting issues panel. This is where you record the issues that the client presented with at your agency.

Presenting issues 🟢 -

Cultural

- Discrimination including racial and sexual
- Lack of family and / or community support

Employment/education/training

- Disengagement with school or other education and training
- Employment difficulties
- Unemployment

Financial

- Financial difficulties
- Problematic gambling

Health & wellbeing

- Medical Issues
- Mental health issues
- Problematic Alcohol Use
- Problematic drug or substance use

Housing/accommodation

- Housing affordability stress (e.g. rent too high)
- Housing crisis (e.g. eviction)
- Inadequate or inappropriate dwelling conditions
- Itinerant
- Previous accommodation ended
- Transition from custodial arrangements
- Transition from foster care / child safety residential placements
- Transition from other care arrangements
- Unable to return home due to environmental reasons

Interpersonal relationships

- Non-family violence
- Physical abuse by an unrelated person
- Relationship / family breakdown
- Sexual abuse
- Time out from family / other situation

Personal safety

- Domestic and family violence

Self reported issue

Select life domain Legal ▼

Select issue Other ▼

Description

Main presenting issue* Housing crisis (e.g. eviction) ▼

Confirm presenting issues

It is also possible to type in your own issue if it does not already exist in the defined list. To do this, tick the self reported issue box at the bottom of the panel and complete the drop downs as required.

Saving the intake - incomplete

At any stage during the intake process you can 'Save incomplete' by pressing the button on the bottom left of the page. This will save any already confirmed panels. To return to the intake later you will need to open the client record, click the *Intake* menu and select *cover page*. You will then be able to continue the intake.





















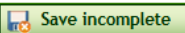
Note: information in a saved incomplete intake will not be transferred back into the individual screens in the client menu. This will not occur until the intake has been saved and completed.

Completing the intake


Once the intake is completed (each panel has been confirmed) the *Complete intake* button will be available. If the button is greyed out it is an indication that a section of the intake has not been completed correctly. If this is the case, review the intake panels to ensure they all have a green tick. Any panels that still show the green circle require attention.

Once an Intake is saved through the *Complete intake* button it cannot be edited. Please ensure the entered information is correct before finalising the intake.

Below: An intake that is completed, in view mode and with each panel collapsed. This intake is ready to be confirmed by clicking the 'Complete intake' button.

Marcus Simpson 			
Client number	56680515 (Unassisted)	Date of birth	26/12/1987 (38)
Lead agency	Terrace Boarding House Liaison Worker 		
 Intake for this client The existing information for this client has been pre-selected in the panels below. Each panel requires review and confirmation of the client's situation at presentation and, where required, the week before.			
Notice of information provision			
Date notice advised	20/04/2026		
Intake details	Edit details  		
Housing	Edit housing  		
Income	Edit income  		
Education	Edit education  		
Personal details	Edit personal details  		
Health & wellbeing	Edit health & wellbeing  		
Contact details	Edit contact details  		
Presenting issues	Edit presenting issues  		
			

On completing the intake, a pop up will appear asking if the client is presenting alone or not.

 **Presenting Unit question**


Is the client presenting alone? If so, select 'yes'

If multiple clients have presented together, select 'no' to proceed to the presenting unit screen

Select the appropriate response.

If the client is presenting alone, you can skip to the [Services](#) section of this manual. If the client is part of a presenting unit, you will be directed to the presenting unit screen. Read on to the next section for instructions on Presenting units.

Once an Intake is completed on a client record, the Intake menu becomes available. The user can now navigate to the services page, the presenting unit page or view the details of the intake through the cover page.

Intake	
Cover page	
Services	
Presenting unit	

If you will not be proceeding with assisting the client, you can close the record using either the [Add unassisted](#) or [End support](#) function at this stage.

Presenting unit

The presenting unit function records the relationships between groups of people that present to your agency for assistance.

A presenting unit can be a family, a group of friends, siblings or a grandparent and his/her grandchildren.

Example: *two friends who were house sharing together are evicted from their property and present together at your agency for assistance. These two friends would therefore be a presenting unit.*

AIHW Definition of a presenting unit

A presenting unit is a client or group of clients that present together to a specialist homelessness agency. People who do not receive a service, and are therefore not clients, are not included in the presenting unit. This may include children who present with a parent or guardian but do not receive any services themselves.

Presenting units may be:

- A person alone
- A person with child(ren)
- A couple with child(ren)
- A couple without child(ren)
- Siblings
- Multigenerational family members
- A group including unrelated persons

How to record a presenting unit

The presenting unit section is found within the Intake menu. It can only be accessed after an intake has been completed for all clients that will be members of the unit. If you have indicated during the intake that the client is not presenting alone, you will be directed to the presenting unit screen to assemble the unit.

Note: *being the presenting unit head does not give one person a higher status above another; it is simply a way of recording the spokesperson of the group, and does not affect system functionality in any way.*


Always assemble the unit from the record of the presenting unit head. The presenting unit head should be the spokesperson of the group, and should have the earliest, or same, start date as the other unit members.

Note: if the head of a presenting unit is 14 years old or younger the system will display a pop-up warning **'are you sure you want to make this person the head of the presenting unit? they are 14 years old.'** This is to avoid accidentally making a child the head of the presenting unit in a family unit.


To add a member to the presenting unit, enter their details into the search fields on the presenting unit screen, and select the search button, as shown in the screenshot below. A list of matches will then appear.


You can find instructions on putting the unit together in the info bubble at the top of the screen;

Add presenting unit

Marcus Simpson 

Client number 56680515 (Casual) Date of birth 26/12/1987 (38)

Lead agency Terrace Boarding House Liaison Worker 

 • If the unit member does not have a client record, use the 'add new client based on this record' button to add them to the system, then return to the head of the presenting unit to connect them using the plus icon

• If the unit member has an open client record, find them in the displayed list (which can be narrowed using the search fields), and connect them using the plus icon.




• If the unit member has an inactive client record, complete an intake, then return to the head of the presenting unit to connect them using the plus icon

Search for existing client to add to presenting unit

Surname First names

Alias / nickname Date of birth dd mm yyyy

Sex

 Search  Clear  Add new client based on this record

Note: all clients to be added to the presenting unit must already have a current client record on H2H. The presenting unit function is a way of linking those records together. If the client you wish to add to the unit does not have an open record, follow the instructions in the info bubble on the presenting unit screen unit screen.

In the list of search results, you will notice 2 icons. The orange 'people' icon indicates that that client is already part of a presenting unit and therefore cannot be added to this unit.

The green + icon is the 'Add client to presenting unit' icon. Click this to add the client to the presenting unit.

homeless2HOME Training Outer Southern Generic Homelessness Service

Client > presenting unit > Add client to presenting unit

Add presenting unit

Brooke Estabrooks
 Client number 55679930 (Active) Date of birth 1982 (34)
 Lead agency Outer Southern Generic Homelessness Service

Search for existing client to add to presenting unit

Surname First name
 Alias / nickname Date of birth
 Sex

Results: 1-3 of 3

Name	DOB	Status	Client Pathway
Brooke Estabrooks	M		<input type="button" value="+"/>
Smith, Terry	M 2/5/1989	Active Confirmed	<input type="button" value="+"/>
Smith, Terry 55678308			<input type="button" value="+"/>

Identify the record you want to add to the presenting unit, select the 'add client to presenting unit' icon.

homeless2HOME Training Outer Southern Generic Homelessness Service

Client > Presenting unit > Add client to presenting unit

Add client to presenting unit

Brooke Estabrooks
 Client number 55679930 (Casual) Date of birth 1982 (32)
 Lead agency Outer Southern Generic Homelessness Service

Terry Smith is a of Brooke Estabrooks (shown above)

Terry Smith
 Client number 55678308 Date of birth 10/8/1970 (43)
 Lead agency Outer Southern Generic Homelessness Service

- Spouse/partner
- Parent/guardian
- Child
- Step child
- Foster child
- Sibling
- Uncle
- Nephew
- Grandparent
- Grandchild
- Other relative
- Unrelated person
- Other relationship
- Unrelated flatmate or co-tenant
- Unknown

This screen shows both the presenting unit head and member records. The first record is the client record you are currently in and will become the presenting unit head. The second record is the client you are adding to the presenting unit. In between the two blue client record boxes is the relationships dropdown, from this menu choose the relationship between the two clients (as shown above).

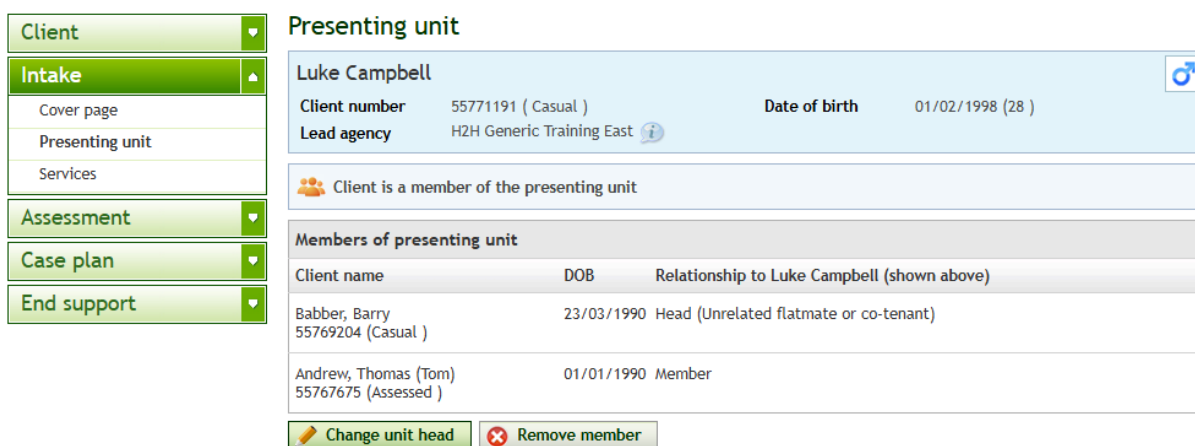
Select the relationship of the presenting unit member to the presenting unit head, click the *Save* button. This returns you to the 'Presenting unit' page that now lists the client you have just added. From this screen you can add another member to the presenting unit, or edit/remove the member you just added by clicking the edit pencil.

Once you have assembled the presenting unit, unit members will be visibly grouped underneath the presenting unit head in your my clients list, on your home screen.



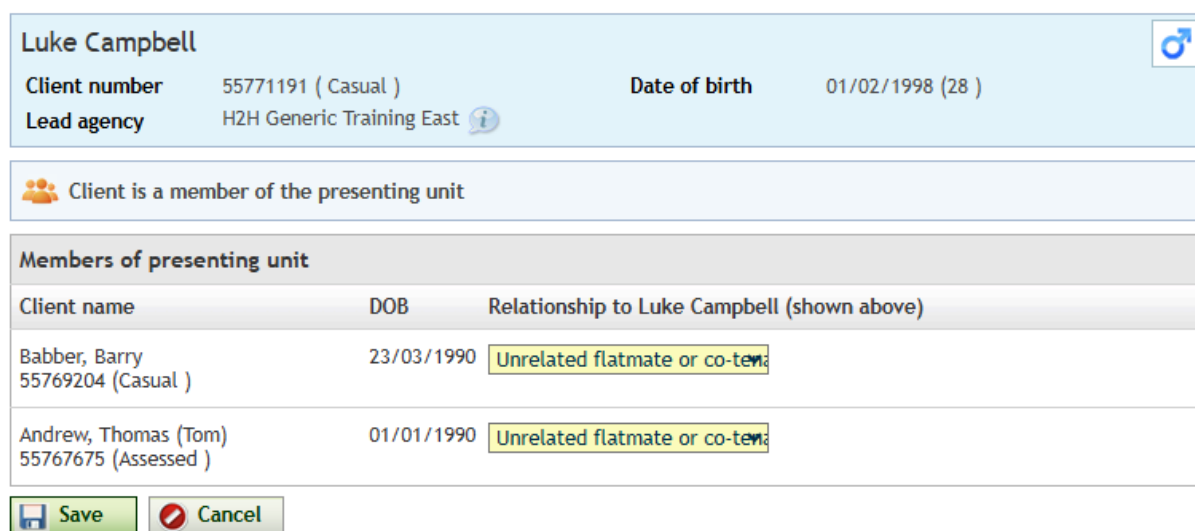
Changing a presenting unit head

To change a presenting unit head, go to 'presenting unit' under the intake tab in the client record that will be the presenting unit head (as shown below).




Click *Change unit head* then select the Relationship to the unit head from the drop down. Select *Save*.

Presenting unit




A confirmation box will pop up, select Yes to confirm the change.

 **Confirm: Change presenting unit head**


Are you sure you wish to change this client as the head of the presenting unit?


Your client will now display the text 'Client is the head of the presenting unit'.

Presenting unit



Luke Campbell 

Client number 55771191 (Casual) **Date of birth** 01/02/1998 (28)

Lead agency H2H Generic Training East 

 Client is the head of the presenting unit


Members of presenting unit

Client name	Relationship	
Andrew, Thomas (Tom) 55767675 (Assessed)	Unrelated flatmate or co-tenant	
Babber, Barry 55769204 (Casual)	Unrelated flatmate or co-tenant	


Removing a presenting unit member


If you need to edit or remove members of a presenting unit, this can only be done from within the presenting unit head's record.

To remove members of the presenting unit, navigate to the 'presenting unit' page within the 'intake' menu. Click the edit pencil that corresponds to the client you want to remove. This takes you to the 'edit presenting unit' page.



Albert Brown  

Client number 56492514 (Active) **Date of birth** 31/08/1991 (34)

Lead agency Terrace Boarding House Liaison Worker 

 Client is the head of the presenting unit

Members of presenting unit

Client name	Relationship	
Client, Testing Add Issue Housing Crisis 56680416 (Active)	Niece	
Green, Aimee 56184464 (Active)	Spouse/partner	

You can change the relationship between the two clients by using the drop down or remove the member from the presenting unit by clicking the *remove member* button.

Edit presenting unit

Albert Brown			
Client number	56492514 (Active)	Date of birth	31/08/1991 (34)
Lead agency	Terrace Boarding House Liaison Worker 		

Aimee Green is a Spouse/partner of Albert Brown (shown above)

Aimee Green			
Client number	56184464 (Active)	Date of birth	29/09/1983 (42)
Lead agency	Terrace Boarding House Liaison Worker		

Intake services

An intake service is a way of recording;

- The services and assistance your agency provided to a client
- Any services and assistance provided by another SHS or mainstream provider
- Any services and assistance the client needs, that cannot be provided or referred

Within H2H, there are two places where users can record services; within the Intake menu (service) or within the case plan. All assistance provided to a client prior to a case plan is entered as an Intake service, and all assistance provided to a client after a case plan has been opened is recorded as a case plan service.

When to add an intake service

An intake service should be recorded each time a client is provided with direct assistance, is assisted by another service provider, or an unmet need is identified.

It is important for H2H users to be mindful of what they enter as a service. To warrant a service being recorded, the client must have directly received something from your agency.

Examples of a provided service:

Jenny's worker drove her to a doctor's appointment - This is a provided service of Transport

Case Manager Belinda completed and sent off an application for housing for her client – This is a provided service of Advocacy/liaison on behalf of client

Examples of what does **NOT** constitute a provided service:

Client Jenny found her own way to her doctor's appointment

Case Manager Belinda drove to her client's house for a visit, but her client was not home

The AIHW requires the capture of information about all services, whether provided, referred or an unmet need for a client, and these services are broken into three categories;

- Housing and accommodation services
- General assistance and support
- Specialised services

Those services and assistance listed in the 'housing/accommodation' and 'general assistance and support' categories can be provided by Specialist Homelessness Services. Some of the service types in the 'specialised services' category cannot be provided by an SHS, but are recorded through an external referral to a mainstream agency (e.g. Child Protection Services, Mental Health Services, etc.)

Services and assistance list	
Housing/Accommodation	<ul style="list-style-type: none"> Assistance to sustain tenancy or prevent tenancy failure or eviction Assistance to prevent foreclosures or for mortgage arrears Short term or emergency accommodation Medium term/transitional Housing Long term Housing
General Assistance and Support	<ul style="list-style-type: none"> Advice/information Advocacy/liaison on behalf of client Assertive outreach for rough sleepers Assistance for domestic/family violence – perpetrator support services Assistance for domestic/family violence – victim support services Assistance for incest/sexual assault Assistance for trauma Assistance to obtain/maintain government allowance Assistance with challenging social/behavioural problems Child Care Child contact and residence arrangements Court Support Educational Assistance Employment Assistance Family/Relationship assistance Financial information Laundry/Shower facilities Legal information Living skills/personal development Material aid/brokerage Meals Other basic assistance Recreation Retrieval/storage/removal of personal belongings School liaison Structured play/skills development Training assistance Transport
Specialised Services	<ul style="list-style-type: none"> Assistance to connect culturally Child protection services Child specific specialist counselling services Counselling for problem gambling Culturally Specific Services Drug/alcohol counselling Family planning support Financial advice and counselling

	Health/Medical services Interpreter services Intellectual disability services Mental health services Other specialised services Parenting skills education Physical disability services Pregnancy Assistance Professional legal services Psychological services Psychiatric services Specialist counselling services
--	---

Not all SHS in South Australia are funded to deliver the same types of assistance. Some options will only be available to certain agencies for provision or referral, depending on funding arrangements and service agreements.

Definitions of each specific service in the list above can be found in detail in the AIHW - SHS collection manual accessible on the H2H support page.

Note: *a specific service type is not available to record 'assistance to obtain housing or accommodation' in the SHSC. This is because general assistance to obtain housing or accommodation is the fundamental role of all specialist homelessness services, so all agencies will be providing this service to all clients. Therefore it does not require a specific category on the list of services and assistance.*

The different delivery types of services

Within H2H there are 3 different 'delivery types' available when recording a service. Services can be entered as:

Delivery type definitions	
Provided Service	<ul style="list-style-type: none"> refers to a support service which is provided directly by your agency All support provided should be recorded – even if the client does not acknowledge a need for services Can be entered by either a lead or consented agency You should only record that accommodation has been provided if you have provided the client with the actual accommodation e.g. agencies that have onsite crisis accommodation or medium term/transitional accommodation.
Referred service (within H2H or external to H2H)	<p>Often a client needs a service that cannot be provided by your agency. In the instances where you have arranged for a service to be provided to your client by another agency, this is recorded as a Service Referral. Within H2H, you can record referrals to internal agencies (those agencies that use H2H), and external agencies (those agencies that do not use H2H).</p> <ul style="list-style-type: none"> You would enter a referred service if you refer a client to another service provider AND that service provider accepts the client for an appointment or interview. Do not complete a service referral if the client is NOT accepted for an appointment or interview. In that circumstance you would enter an unmet need (see below). You only record that accommodation has been referred if you referred the client to another service provider to provide the actual accommodation.
Unmet need	<p>Used to record instances where a client needs a type of assistance that cannot be provided or referred.</p> <ul style="list-style-type: none"> This refers to any services or assistance you assess the client as needing, whether or not the client accepts or agrees to participate in this support service. Even when a service cannot be provided, it is important to record the client's needs because this helps to identify unmet need.

Provided services

How to add a provided service

To record a provided service, follow these steps.

On the services screen within the intake menu, click the *Add service* button (as shown below);

The screenshot shows the 'Services' section for a client named Marcus Simpson. On the left is a navigation menu with options: Client, Intake, Assessment, Case plan, and End support. The 'Intake' menu is expanded, showing sub-options: Cover page, Presenting unit, and Services. The main content area displays client details: Client number 56680515 (Casual), Date of birth 26/12/1987 (38), and Lead agency Terrace Boarding House Liaison Worker. Below this is an information box stating: 'There are no services entered for this client. To add a service use the 'Add service' button below. Service can be added to this intake after it has been saved and until a case plan is opened. If client refuses service, use the 'Add unassisted' button below. A reason must be selected, and the intake will be closed.' At the bottom of this box are two buttons: '+ Add service' (circled in red) and '+ Add unassisted'.

Select *Provide service* from the delivery type drop down box

The screenshot shows the 'Add service' screen for a client named Brooke Estabrooks. The navigation menu on the left is the same as in the previous screenshot. The main content area displays client details: Client number 56679786 (Casual), Date of birth 10/08/1999 (19), and Lead agency Eastern Adelaide Generic Homelessness Service. Below this is an information box: 'Adding or referring a service. Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service. For 'Unmet needs', use the drop-down to specify the service to request.' The 'Delivery type' dropdown menu is open, showing options: 'Provide service' (circled in red), 'Referral external to H2H', and 'Unmet need'. There is also a 'Lookup service' button to the right of the dropdown. At the bottom left are 'Save' and 'Cancel' buttons.

The *Lookup service* button now becomes available, click the lookup service button.

homeless HOME Training H2H Generic Training East

Client summary > Intake > Services > Add service

Client: Intake

Thomas Andrew (Tom)

Client number: 55767675 (Casual) Date of birth: 01/01/1990 (36)

Lead agency: H2H Generic Training East

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service. For 'Unmet needs', use the drop-down to specify the service to request.

Delivery type * Provide service

Provided service

Provided service

Service element

Program

Provider: H2H Generic Training East

Date requested * 04/05/2026 dd/mm/yyyy

Response type *

Responsibility *

Service description *

Start date * 04/05/2026 dd/mm/yyyy

End date *

Case worker * Lachlan McConnochie

The 'provided service lookup' pop-up box now appears. Click on the relevant provided service, then the service element and click the *select* button (as shown on next page).

Provided service lookup

My agency

Provided service

- GEN - Advice/information
- GEN - Advocacy/liaison on behalf of client
- GEN - Assertive outreach for rough sleepers
- GEN - Assistance for family/domestic violence - perpetrator support services
- GEN - Assistance for family/domestic violence - victim support services
- GEN - Assistance for incest/sexual assault
- GEN - Assistance for trauma

Service element

- Boarding house support - GEN - Advice/information (H2H Generic Training - East)
- Early intervention/prevention - GEN - Advice/information (H2H Generic Training - East)
- Gateway for service - GEN - Advice/information (H2H Generic Training - East)
- In centre support - GEN - Advice/information (H2H Generic Training - East)

This returns you to the 'Add service' screen with the details selected from the pop-up displayed in the 'provided service' section.

Note: the list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency is part of an alliance. If you are unsure which service element to choose for the clients' particular circumstance, speak to your team leader or manager. You can find definitions for each service element at the end of this user guide.

homeless HOME Training H2H Generic Training East

Client summary > Intake > Services > Add service

Client: Thomas Andrew (Tom)
Client number: 55767675 (Casual)
Date of birth: 01/01/1990 (36)
Lead agency: H2H Generic Training East

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service. For 'Unmet needs', use the drop-down to specify the service to request.

Delivery type: Provide service [Lookup service]

Provided service

Provided service: GEN - Advice/information
Service element: In centre support - GEN - Advice/information
Program: H2H Generic Training - East
Provider: H2H Generic Training East

Date requested: 04/05/2026 dd/mm/yyyy
Response type: [dropdown]
Responsibility: [dropdown]
Service description: [text area]

Start date: 04/05/2026 dd/mm/yyyy
End date: [dropdown] dd/mm/yyyy

Case worker: Lachlan McConnochie [Change case worker]

[Save] [Cancel]

Details added by the 'look up service' button above

Next, you are required to enter;

- date that the client requested the service (this is pre-filled with today's date);
- Response type – Crisis or Non-crisis;
- Responsibility – client or support worker

Date requested * 04/05/2026 dd/mm/yyyy
Response type * Non-crisis
Responsibility * Support worker

Now enter a service description. This field allows you to add the details of the provided service, as you may need to look back at this information in the future; so, it is a good idea to write specific information about the nature of the provided service.

Service description *

Next select a start date and an end date for the service. Most provided services are delivered as one-off services, such as transport, advice, advocacy etc. these would start and end on the same day. Where a client is being provided with accommodation or is attending a set program, the end date would be the day that the accommodation/program ends.

Example:

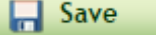
- You drive your client to her doctors appointment. The start and end dates in this instance would be the same day
- A client is being provided with transitional accommodation and has signed a 3 month lease with your organisation. In this example the start and end dates would match the dates of the lease term

Start date * dd/mm/yyyy


End date * dd/mm/yyyy

Using the same start and end dates indicates the service was a 'once off' service such as driving a client to an appointment

Note: it is possible to edit end dates in instances where a client stops attending programs or exits accommodation. The next section explains how to edit a provided service.


Once you have completed all mandatory fields. Select the  button to add the service. You are then returned to the Services screen where you can view the service you have just entered, and add further services.



Services

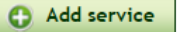
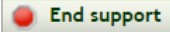
Brooke Estabrooks 

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

 There are no unmet needs entered for this client

Services					
Service element	Provided service	Provider	Start date/ end date	Action	Status
In centre support - GEN - Advice/information	GEN - Advice/information	Eastern Adelaide Generic Homelessness Service	14/02/2019 14/02/2019		


Editing a provided service

A service can be edited by clicking the edit pencil at the end of the relevant row. Only services which are open (the end date has not passed) can be edited. The only information that can be edited once a service has been saved is the following;

- Date requested
- Responsibility
- Start date
- End date


To edit, select the edit pencil icon as indicated below.



Services

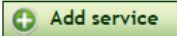
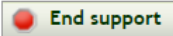
Brooke Estabrooks 

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

 There are no unmet needs entered for this client


Services					
Service element	Provided service	Provider	Start date/ end date	Action	Status
In centre support - GEN - Advice/information	GEN - Advice/information	Eastern Adelaide Generic Homelessness Service	14/02/2019 14/02/2019		

 **Add service**  **End support**

Once a service has passed its end date it can no longer be edited but can now be repeated.

Repeating a service

A service that is closed (the end date has passed) will display a repeat icon instead of an edit pencil.

Services					
Service element	Provided service	Provider	Start date/ end date	Action	Status
In centre support - GEN - Advice/information	GEN - Advice/information	H2H Generic Training East	24/03/2026 24/03/2026		

 **Add service**  **End support**

Repeating a service is a quick way to record the services that have been provided to your client more than once. Using this function pre-fills many of the fields that you would normally have to enter when adding a new service.


Example: You provided transport to take your client to a doctors appointment on Monday. On Wednesday your client requires transport again to a follow-up appointment.

Rather than entering a new service on Wednesday, you could click the repeat service button that corresponds to Mondays transport service.


Deleting a provided service



Intake services can be deleted providing they are still open (the end date has not passed). To delete a service, you will need to locate the service on the Intake services page and click within the box of that service (*as shown below*)

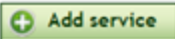
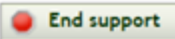
Services

Brooke Estabrooks 

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)
Lead agency Eastern Adelaide Generic Homelessness Service

 There are no unmet needs entered for this client


Service element	Provided service	Provider	Start date/ end date	Action	Status
In centre support - GEN - Advice/information	GEN - Advice/information	Eastern Adelaide Generic Homelessness Service	14/02/2019 14/02/2019		

Upon clicking within the box, the 'view service' screen appears – *Note: this is different to the edit service page that would appear if you had clicked the edit pencil.*

The *delete service* button is located at the bottom right of this screen.

View service

Brooke Estabrooks 

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)
Lead agency Eastern Adelaide Generic Homelessness Service

Response type Crisis

Service description During todays meeting I provided Brooke with details on her future housing options

Date created 14/02/2019

Delivery type Provide service

Provided service GEN - Advice/information

Service element In centre support - GEN - Advice/information

Program Eastern Adelaide Generic Homelessness Service

Provider Eastern Adelaide Generic Homelessness Service




Date requested 14/02/2019

Responsibility Support worker

Start date 14/02/2019

End date 14/02/2019

Case worker Kirsten Moyle

Referred services

A service referral in H2H is recorded in a similar way to a provided service. You would use the service referral function in instances where a service has been provided to your client, but not provided by your agency.

There are two types of service referrals within H2H. They are:

1. Referral within H2H (NAHA) – to be used when referring to an agency that uses H2H (e.g. other Specialist Homelessness and Domestic & Family Violence Services)
2. Referral external to H2H – to be used when referring to an agency who does not use H2H (e.g. services such as health, employment services, etc)

The screenshot shows the 'Add service' form in the H2H system. The client is Brooke Estabrooks, with client number 56679786 (Casual) and date of birth 10/08/1999 (19). The lead agency is Eastern Adelaide Generic Homelessness Service. The form includes a 'Delivery type' dropdown menu with the following options: 'Provide service', 'Referral within H2H (NAHA)', 'Referral external to H2H', and 'Unmet need'. The 'Referral within H2H (NAHA)' and 'Referral external to H2H' options are highlighted with a red box. There is also a 'Lookup service' button and a 'Save' button.

All referrals in H2H, including service referrals should be completed as a 'warm referral', meaning that prior to sending the referral on H2H, you have contacted the agency you are referring to, discussed the referral and ensured it is appropriate before sending.

Referrals within H2H (internal referrals)

Internal referrals are used to record where the client has been/or is going to be provided with assistance by another SHS.

How to add an internal referral

After selecting the 'Referral within H2H' option from the delivery type drop down box, press the *Lookup service* button.

The 'Referred service lookup' pop-up box will then appear. Select the service you have referred or are referring.

Note: ensure you select the correct prefix for the agency you are referring to; e.g. if you are referring your client to another generic service you would select the 'Gen' prefix. If you were referring a client to a domestic violence service for counselling, you would select the 'DV' prefix.

Next, select the agency from the list available in the lower box and press the *Select* button.

Referred service lookup

My region

Provided service

- DV - Short term or emergency accommodation
- DV - Specialist counselling services
- DV - Structured play/skills development
- DV - Training assistance
- DV - Transport
- First Nations - Advice/information
- First Nations - Advocacy/liason on behalf of client
- First Nations - Assertive outreach for rough sleepers
- First Nations - Assistance for family/domestic violence - remote/rural support...

Agency

- Kurlana Tampawardli
- Toward Home: Wardli-Ana
- Western Aboriginal Specific Homelessness Service

Select Cancel

Note: if referring to an agency outside of your region (i.e your agency operates in the southern metro but you are referring a client for a service in the western metro), you will need to change the 'my region' drop down to 'all'.

Having selected your responses from the pop-up box you will be returned to the 'Add service' screen where you will need to enter:

- The Reason for referral
- The name and contact details of the agency that you are referring to
- The response type, responsibility and description of the service
- The requested, start and end dates of the referral

To be able to send the referral the client must provide consent to the referring agency. To add consent, click the *Add consent* button located in the blue panel at the bottom of the screen.

Consent required
The client should provide consent to share and exchange information with the selected provider.

Add consent

The following 'Add consent' pop-up box appears:

Add consent

Date granted 13/01/2014

Granted at Outer Southern Generic Homelessness Service

Consent type * Written

Hardcopy location * In top drawer filing cabinet, office 2.

Client agreement * Yes

Consented agencies • Inner Southern Generic Homelessness Service

Expiry date * 13/07/2014 dd/mm/yyyy

Save Cancel

Select the consent as written or verbal. If written is selected, you will need to record where the hardcopy is located. Next select if the client has agreed.

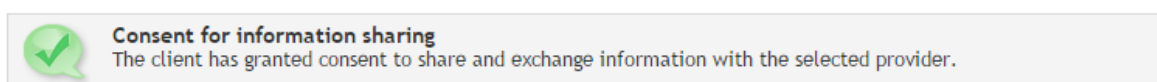
If the client record you are adding a service to is a child, the add consent will appear slightly differently. Please refer to the [consents](#) section for guidance if needed.


Note: a client does not necessarily always need to agree to the consent. This may include instances where information sharing is necessary for legal reasons as outlined in the notice of information provision.

Lastly enter an expiry date for the consent. The expiry date is automatically defaulted to 6 months from today's date, however this can be altered.

Once you have completed this screen press the *Save* button.

You are then returned to the 'Add service' screen. Check that a green tick now appears in the consent box at the bottom of the page;



You can now select the  **Send** button. Once selected you will be returned to the services screen and see the referral you just sent in the list of services (as shown below).

Services					
Service element	Provided service	Provider	Start date/ end date	Action	Status
<i>Not assigned</i>	Gen - Financial information	Inner Southern Generic Homelessness Service	13/01/2014 14/01/2014		
In centre support - Gen - Advocacy/liaison on behalf of client	Gen - Advocacy/liaison on behalf of client	Outer Southern Generic Homelessness Service	06/01/2014 06/01/2014		
In centre support - Gen - Advice/information	Gen - Advice/information	Outer Southern Generic Homelessness Service	06/01/2014 06/01/2014		

A referral shown within the services list will initially appear slightly different to provided services.

In the 'action' column the blue *withdraw* button can be seen. The service element column displays "not assigned" as the service element is selected by the provider when the referral is accepted. Currently this referral is still 'pending' meaning it has not yet been accepted by the other agency.

For information on how to accept a service referral please see the [Agency manager functions](#) section

Withdrawing internal referrals

An internal referral can be withdrawn at any point before the referral is accepted. Once the referral is accepted, the receiving agency selects a service element, assigns a case worker, and the *withdraw* button disappears.

To withdraw a referral select the withdraw button as indicated below.

Referrals external to H2H cannot be withdrawn as they are accepted automatically once sent.

Services					
Service element	Provided service	Provider	Start date/ end date	Action	Status
<i>Not assigned</i>	First Nations - Advice/information	Withdraw	04/01/2014 04/01/2014		

Referrals external to H2H

External referrals are used to record where the client receives assistance from an agency that does not use H2H (e.g. mainstream services such as health, employment services, etc.)

How to add an external referral

Select 'Referral external to H2H' from the delivery type drop down box.

homeless²HOME **Eastern Adelaide Generic Homelessness Service**

Client summary > Intake > Services > Add service

Client Brooke Estabrooks

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service.
For 'Unmet needs', use the drop-down to specify the service to request.

Delivery type * Lookup service

Date requested * Provide service

Service description * Referral within H2H (NAHA) **Referral external to H2H** Unmet need

Save **Cancel**

Select an option from the 'Service' drop down box.

homeless²HOME **H2H Generic Training East**

Client summary > Intake > Services > Add service

Client Thomas Andrew (Tom)

Client number 55767675 (Casual) **Date of birth** 01/01/1990 (36)

Lead agency H2H Generic Training East

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service.
For 'Unmet needs', use the drop-down to specify the service to request.

Delivery type * Referral external to H2H SA community

Service referral

Service * Assistance to connect culturally **Assistance with immigration services** Child protection services Child specific specialist counselling services Counselling for problem gambling Culturally specific services Drug / alcohol counselling Educational assistance Employment assistance Family planning support Financial advice and counselling Health / Medical services Intellectual disability services Interpreter services Long term housing Medium term/transitional housing Mental health services Other specialised services Parenting skills education

Provider *

Reason for referral *

Contact name *

Email address *

Phone #

Date requested *

Response type *

Responsibility *

Service description *

Start date *

End date *

Case worker * Change case worker

The next field is the 'Provider' field. If the agency you are referring to is listed choose the correct option, if not choose the '-----not listed-----' option.

Note: this list contains previous referred agencies. If you have not sent any referrals yet for this client, then no list will appear.

Intake ▲
Cover page
Services
Presenting unit

Assessment ▼
Case plan ▼
End support ▼

BROOKE ESTADROOKS
Client number 55679930 (Casual) Date of birth 1982 (32)
Lead agency Outer Southern Generic Homelessness Service

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select a service.
For 'Required' services, use the drop-down to specify the service to request.

Delivery type * Referral external to H2H ▼

Service referral

Service * Parenting skills education ▼

Provider * ----- not listed ----- ▼

Reason for referral * DASSA
----- not listed -----

Contact name * Mrs Smith

Email address * Smith@smith.com

Phone # 08856622 Fax #

Complete the 'reason for referral' section and enter the contact details of agency/worker you are referring too.

Complete the responsibility, service description and the requested, start and end date fields.

If the 'provider' field is 'not listed' you will need to add a consent before you send the referral. Click the *Add consent* button at the bottom of the screen and complete the pop-up (see [consents](#) for more information).

homeless HOME Training H2H Generic Training East

Client summary > Intake > Services > Add service

Client Add service

Thomas Andrew (Tom)

Client number 55767675 (Casual) Date of birth 01/01/1990 (36)

Lead agency H2H Generic Training East

Adding or referring a service
Select a delivery type from the options below, then use the 'Lookup service' button to select the requested service. For 'Unmet needs', use the drop-down to specify the service to request.

Delivery type * Referral external to H2H SA community

Service referral

Service * Parentine skills education

Provider * not listed

Reason for referral * reason for referral goes here

Contact name * duty worker

Email address * h2h@sa.gov.au

Phone # Fax #

Date requested * 04/05/2026 dd/mm/yyyy

Response type * Non-crisis

Responsibility * Support worker

Service description * client is attending parenting skills night

Start date * 04/05/2026 dd/mm/yyyy

End date * 08/05/2026 dd/mm/yyyy

Case worker * Lachlan McConnochie Change case worker

Consent required
The client should provide consent to share and exchange information with the selected provider. Add consent

Preview referral form
Preview the PDF referral form that will be automatically emailed to the provider. Preview referral form

Send and accept Cancel

Once consent is added the referral is now ready to send. You will notice the send button says, 'Send and accept' rather than just 'send'. This is because you are sending an external referral to an agency that does not use H2H and therefore has no way of accepting the referral within the H2H system. By pressing the *send and accept* button you are acknowledging that the provider has already assisted, or has agreed to assist the client.

Unmet need

You can also record services that a client may need but cannot be provided. This is referred to as an Unmet Need. If the need can later be met, it can be converted to either a provided or a referred service (see the [converting an unmet need](#) section for more detail)

When to record an unmet need

An unmet need should be entered when it is identified that a client may need a particular service, but that service cannot be provided, this can be due to the service being unavailable or the client not accepting an offered service.

Even when a service cannot be provided, it is important to record the client's needs because this helps to identify unmet need.

Example 1:

It has been identified that a client needs financial counselling but the only agency that provides this service is currently not taking any new appointments as they have a 3 month waiting list.

In the example above, you would enter an unmet need of financial counselling, by following the steps in the next section.

Example 2:

A single mother presents with her children having been evicted. They are provided with short term accommodation in a motel. They have an unmet need for medium term/transitional accommodation that cannot be provided as there are no vacancies available. The worker records an unmet need of medium term/transitional accommodation for each family member, as they are unable to meet this need for the clients.

Entering an unmet need highlights a gap in service provision and assists in identifying trends for clients.

How to record an unmet need

To record an unmet need, start the same way you would add any other service, by clicking the *add service* button on the services page.

Within the 'Delivery type' drop down box select the *unmet need* option.

The screenshot shows the 'homeless HOME' system interface for the 'Eastern Adelaide Generic Homelessness Service'. The breadcrumb trail is 'Client summary > Intake > Services > Add service'. On the left, there is a navigation menu with options: Client, Intake (selected), Assessment, Case plan, and End support. The main content area is titled 'Add service' and displays client information for Brooke Estabrooks: Client number 56679786 (Casual), Date of birth 10/08/1999 (19), and Lead agency Eastern Adelaide Generic Homelessness Service. Below this, there is an information box titled 'Adding or referring a service' with instructions. The 'Delivery type' dropdown menu is open, showing options: Provide service, Referral within H2H (NAHA), Referral external to H2H, and Unmet need (highlighted with a red box). There is also a 'Lookup service' button. At the bottom, there are 'Save' and 'Cancel' buttons.

You will need to select the unmet need for the client, followed by the prefix. If the unmet need is for a service that your agency will eventually provide, select the prefix that matches your agency target group. If another SHS or an external provider will be providing the service in the future, select their corresponding prefix.

Delivery type * Unmet need Lookup service

Service requested *

Service prefix *

Date requested * 14/02/2019 dd/mm/yyyy

Service description *

Case worker * Kirsten Moyle Change case worker

Save Cancel

Example: if your client has just fled a Domestic Violence relationship, and requires emergency accommodation but none is available, you may choose to enter an unmet need of **Short term/emergency accommodation, with a prefix of DV.**

Note: unmet needs that can be provided at a later point in time can be converted. The ability to convert is largely dependant upon the prefix chosen. Continue reading for further detail.

Complete the remaining mandatory fields, and select the save button. You will then be directed back to the services page and the unmet need you entered will appear at the top of the page.

homeless HOME Training H2H Generic Training East

Client > Intake > Services

Client ▼

Intake ▲

- Cover page
- Presenting unit
- Services

Assessment ▼

Case plan ▼

End support ▼


Services

Thomas Andrew (Tom)







Client number 55767675 (Casual) Date of birth 01/01/1990 (36)

Lead agency H2H Generic Training East

Unmet needs

Unmet need	Service description	Date requested	
GEN - Short term or emergency accommodation	Tom n accom curre	/2026	

Services

Service element	Provided service	Provider	Start date/ end date	Action	Status
N/a	Drug / alcohol counselling	DASSA	04/05/2026 12/06/2026		
Not assigned	Advice/information		04/05/2026 04/05/2026		
In centre support - GEN - Advice/information	GEN - Advice/information	H2H Generic Training East	24/03/2026 24/03/2026		

+ Add service End support

Annotations:
 - Red arrow points to the edit icon in the Unmet needs table.
 - Red arrow points to the edit icon in the Services table.
 - Black box: "Click on the pencil to navigate to the edit service screen, where you can edit the unmet need or delete it"
 - Black box: "Click inside the box (not on the edit pencil) to navigate to the view service screen where you can close the unmet need"

How to close an unmet need

If you have recorded an unmet need that was incorrect, or is no longer needed by the client, close it by clicking anywhere on the service to open it.

homeless HOME UAT Eastern Adelaide Generic Homelessness Service

Client > Intake > Services > View service

Client [dropdown]
Intake [dropdown]
Cover page
Services
Presenting unit
Assessment [dropdown]
Case plan [dropdown]
End support [dropdown]

View service

Brooke Estabrooks [female icon]

Client number 56679786 (Casual) **Date of birth** 10/08/1999 (19)
Lead agency Eastern Adelaide Generic Homelessness Service

Service description Brooke needs crisis accommodation, no beds available
Date created 14/02/2019

Delivery type Unmet need
Date requested 14/02/2019
Service requested DV - Short term or emergency accommodation

Case worker Kirsten Moyle

Edit service Return Close service

Select the 'close service' button and record the reason you are closing the unmet need.

Close service

Confirmation
You are about to close this service
Once this service has been closed, it can not be modified.

Closing reason * [dropdown]
Entered in error
No longer relevant
Need unmet at exit

Close & save service Cancel

Converting an unmet need to a provided or referred service

If you are now able to meet the need for your client, you can convert the original unmet need to either provided or referred. This indicates that a need that had once been unmet, is now met.

To convert an unmet need, click on the edit pencil at the end of its row on the services screen. This will take you to the 'edit service' screen. This will enable you to convert the service using the 'Delivery type' drop down menu (as shown below).

When converting an unmet need, you may be restricted in your choice of delivery type. This is indicated by a choice within the menu being greyed out (as shown in the screenshot below). A delivery type might be greyed out if your agency does not provide this service.

The screenshot shows the 'edit service' screen for a client named Brown Bear. The 'Delivery type' dropdown menu is open, showing options: 'Unmet need' (selected), 'Provide service' (greyed out), 'Referral within H2H (NAHA)', and 'Referral external to H2H'. A red arrow points to the 'Provide service' option, which is greyed out. A text box with a black border and white background says 'Notice the 'Provide service' option is greyed out'.

Example: In the above scenario, it was entered that the client needed **DV – Short term/emergency accommodation**. When attempting to convert this there is only the option to refer the service, either internally or externally. It cannot be converted to a provided service because the current lead agency is a generic (GEN) agency and not funded to provide DV services.

What can I do if I cannot convert the unmet need to a 'provided service'?

As in the example above, if you have entered an unmet need that you cannot convert to a provided service it means that you have chosen a service that your agency is not funded to provide. In this case, you can either:

- *Delete the original unmet need and re-enter it with a Prefix that your agency provides (e.g. 'Gen' for generic funded agencies)*
- *or*
- *Convert it to a referral*

Once you have established the delivery type you will be converting to, select it from the delivery type drop down, complete all mandatory fields, and save the service. You will be returned to the services screen and see that the unmet need has been converted to the newly created provided or referred service in the services list.

homeless²HOME

ASSESSMENT


About the assessment

The assessment assesses the factors that have led to your client becoming homeless, or at risk of homelessness. It provides opportunity for workers to record any existing strengths or support networks for the client within each life domain. Every strength, support network or issue that you record can be carried through to a client's case plan.

Starting an assessment

To begin an assessment, click the *Add assessment* button on the Assessment Cover page and enter a date and time that the assessment was conducted.

Note: an intake must be completed before you can start an assessment. An assessment can be backdated, but no earlier than the date of intake. Assessments cannot be forward dated.

homeless HOME  **H2H Generic Training East**
Training

Client > Assessment > Add assessment: cover page

Client ▾

Intake ▾


Assessment ▴

- Cover page
- Behaviour
- Cultural
- Employment/education/trai...
- Financial
- Health & wellbeing
- Housing/accommodation
- Interpersonal relationshi...
- Legal
- Living skills
- Personal safety
- Save & complete


Case plan ▾


End support ▾

Add assessment: cover page


Horace Windlestone-Smythe 

Client number 55771825 (Casual) **Date of birth** 01/01/1980 (46)

Lead agency H2H Generic Training East 

Date of assessment*  dd/mm/yyyy

Time of assessment* hh:mm

 **Save and continue**

The assessment menu

Within the assessment, there are ten 'life domains'. Each life domain contains a list of issues. Commencing an assessment takes you to the first life domain (Behaviour).

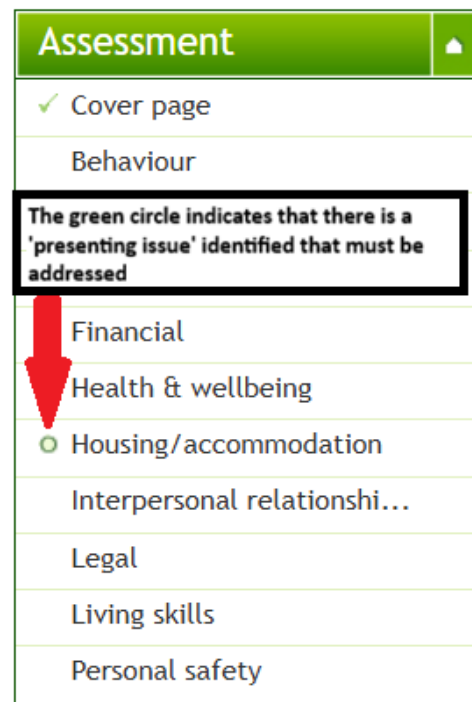
If your client does not have any issues within that life domain, you can use the menu to navigate to another life domain.

Within the assessment you can navigate between the life domains as often as needed until the assessment is saved. Once an assessment is saved using the *save & complete* button on the last page it can no longer be edited.

When issue is added to a life domain and the life domain is saved, a green tick will appear in the menu.

A green circle next to a life domain, indicates an issue in that life domain was identified as part of the Intake presenting issues, these issues must be addressed before the assessment can be completed.

You do not have to complete every life domain, only complete the strengths, supports and issues that are relevant to your client's circumstances.



The life domain page

Within each life domain you can add details about your client's strengths, support networks and issues. Each life domain page contains fields for identified strengths, support networks and a set list of issues that can be selected. You can select as many as are relevant from this list.

Identifying and completing issues

Where an issue in the life domain was identified as a presenting issue from the client's intake this will appear as already selected and expanded (as shown below).

The screenshot shows the 'Add assessment: housing/accommodation' page. On the left is a navigation menu with 'Assessment' selected. The main content area shows client details for Horace Windlestone-Smythe. Below this is a list of issues with checkboxes. The 'Housing crisis (e.g. eviction)' issue is pre-selected (checkbox checked) and has a callout box stating 'the issue is pre-selected as it was identified as presenting issue at intake'. Other issues like 'Identified strengths', 'Support networks', 'Housing affordability stress (e.g. rent too high)', 'Inadequate or inappropriate dwelling conditions', and 'Itinerant' have callout boxes stating 'Every life domain opens with strengths and supports at the top' and 'other issues can be selected as needed using the tick box'. A red arrow points to the 'Presenting issue' checkbox for the housing crisis issue.

To complete the life domain, select each relevant issue and complete the fields that appear.

Removing issues from an assessment

Assessments can only be edited if they have not yet been saved. Once the *Save & complete* button has been clicked it cannot be edited.


To remove an issue from an assessment in progress, open the life domain that contains the issue and deselect the tick box that corresponds to the issue.

Identified strengths

Support networks

Household management

Independent living skills

Any other living skills issue To remove the issue, deselect the tick box 

Issue *

Detail

Goal *No goal has been defined for this issue*

Risk indicator *

Note: issues that were identified at intake as presenting issues cannot be removed.

Goals

Every time an issue is selected within the assessment, you have the option to set a goal.

Setting a goal

To set a goal click the 'lookup goal' button in the bottom right hand corner of every issue (shown below).

Household management

Household cleaning

Household bills

Shopping/banking

Other


General detail

Goal *No goal has been defined for this issue*

Choose a goal from the pop-up box appears. You can use the scroll bar to view additional goals

Select goal

Goal
Anger and mood management
Educational stability
Emotional stability
Employment stability
Establish independent living skills
Financial stability
Housing stability following domestic or family violence
Housing stability following emergency accommodation
Housing stability following non-conventional accommodation
Housing stability following short-term accommodation
Housing stability following sleeping rough



Note: *it is optional to set goals in assessment. If you have not started setting goals with your client yet, the goal can be left blank until case plan stage.*

Removing a goal

To remove a goal, click the *Remove goal* button at the bottom of the issue panel. You can now remove the goal or choose a different one.

Household management

Household cleaning

Household bills

Shopping/banking


Other

General detail

Goal [\[Remove goal\]](#)

Risk indicator

Where a life domain has one or more issues selected you will see a risk indicator at the bottom of the page. This indicates the person's risk of homelessness for that life domain. The level of risk is calculated automatically depending on the type(s) of issues selected and may be low, medium or high. It can be changed by using the drop-down box and choosing another risk level.


Isolation <input checked="" type="checkbox"/>
Detail <input type="text"/>
Goal Reconnect with family / friends [Remove goal] <input type="button" value="Lookup goal"/>
Lack of family and / or community support <input type="checkbox"/>
Migrant <input type="checkbox"/>
Refugee <input type="checkbox"/>
Spiritual needs <input type="checkbox"/>
Any other cultural issue <input type="checkbox"/>
Risk indicator * <input type="text" value="Low"/> 
<input type="button" value="Save and continue"/> <input type="button" value="Save incomplete"/>

Saving the assessment

Once you have finished assessing your client's strengths, support networks and issues you need to finalise the assessment. Ensure you have addressed all the life domains that show a green circle in the menu, then navigate to the Save and complete screen in the Assessment menu.

There are two options for saving your assessment;

- Save and Complete
- Save Incomplete

 Inbox
Pending client referrals (7)
Pending service referrals (9)
Pending consented services (3)
In progress intakes (1)
Pending unmet needs (1)
In progress assessments (0)
Pending case plan reviews (0)
Pending post case reminders (0)
Consent for information sharing expiring (36)
Clients without activity (0)

If you select save the assessment as incomplete you have 30 days to complete it before it is automatically closed. A reminder will appear on the home screen warning you if the assessment is soon to be automatically closed.

Note: *once your assessment has been saved you will no longer be able to edit or make any additions. Assessments are a 'point in time' assessment of the client's issues at the beginning of their support period.*

Viewing a saved assessment

Once saved, the assessment menu will only show the life domains in which strengths, support networks or issues have been identified.



To view the details of a saved assessment, click on any of the life domains in the assessment menu.

homeless HOME Training Outer Southern Generic Homelessness Service

Client > Assessment: cultural

Client: Bruce Lee
 Client number: 55670005 (Active) Date of birth: 3/3/1969 (44)
 Lead agency: Outer Southern Generic Homelessness Service

Risk indicator: Medium

Lack of family and / or community support Presenting issue

Reason for lack of support: Grandmother recently moved into an aged care facility and was Bruce's main support. This has also resulted in Bruce becoming homeless and sleeping rough.

Detail: -

Goal: Housing stability following sleeping rough

Viewing historical assessments: *historical assessments as well as intakes and case plans can be viewed from the [client pathway](#) page (providing you have permission to access the information) by simply clicking the underlined item. If the item is not underlined, it means you do not have permission to view detail.*

Client > Client pathway

Client pathway

Bob Brown
 Client number: 55712101 (Inactive) Date of birth: 10/01/1995 (31)
 Lead agency: H2H Generic Training East

Results: 1-8 of 8

Date created	Pathway	Agency	Reference	Date	Status
15/02/2024	<u>Case plan</u>	H2H Generic Training East	5568455	23/04/2026	Closed
15/02/2024	<u>Assessment</u>	H2H Generic Training East	105598	15/02/2024	Closed
14/02/2024	<u>Intake</u>	H2H Generic Training East	10009	15/02/2024	Closed
26/08/2021	Case plan	Toward Home: Access	5568231	26/08/2021	Closed
26/08/2021	Assessment	Toward Home: Access	103314	26/08/2021	Closed
01/08/2021	Intake	Toward Home: Access	4531	26/08/2021	Closed
13/08/2020	<u>Assessment</u>	H2H Generic Training East	103128		Closed complete
11/08/2020	Intake	H2H Generic Training East	4243	13/08/2020	Closed

« Previous | Page: 1 | Next »

homeless²HOME

CASE PLAN

Prior to starting a case plan

Before you can start a Case plan, an Assessment must be completed and saved. Refer to the 'Assessment' section for instructions on how to do this.

A case manager must be assigned before a case plan can be created.

Client Add case plan: cover page

Brooke Estabrooks

Client number 56679786 (Assessed) Date of birth 10/08/1999 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

There is no case manager assigned to this client.
A case plan can only be created for this client once a case manager has been assigned.

Only workers with agency manager access can assign case managers and caseworkers to clients. For assistance with the assignments function, please see the [assignments](#) section of this manual.

Starting a case plan

To start a case plan, navigate to the case plan menu, click on the cover page, and click the *Add case plan* button (shown below).

homeless? HOME Training Outer Southern Generic Homelessness Service

Client > Add case plan: cover page

Client Add case plan: cover page

Bobby Butter

Client number 55683432 (Assessed) Date of birth 18/07/1996 (17)

Lead agency Outer Southern Generic Homelessness Service

There is no active case plan for this client
To begin a new case plan, select the 'Add case plan' button below.

+ Add case plan

IMPORTANT:

A client must agree to a case plan for one to be created. If your client does not agree, you will not be able to add one. All support would continue to be recorded under the intake services function.

You will then need to complete the fields shown below indicating the date, time of creation and the client agreement.

homeless HOME Eastern Adelaide Generic Homelessness Service

Client > Add case plan: cover page

Client ▾

Intake ▾

Assessment ▾


Case plan ▴

Cover page

Plan summary

End support ▾


Add case plan: cover page

Brooke Estabrooks 


Client number 56679786 (Assessed) **Date of birth** 10/08/1999 (19)

Lead agency Eastern Adelaide Generic Homelessness Service

There is no active case plan for this client
To begin a new case plan, select the 'Add case plan' button below.

Date created * 15/02/2019  dd/mm/yyyy **Time created *** 11:07 AM ▾

Client agreed * Yes ▾ **Client signed *** No ▾

Date of agreement * 15/02/2019  dd/mm/yyyy

Case plan type Specialist Homelessness Services sector


Unmet needs at intake (outstanding)
The services listed below have been identified as unmet needs for this client at intake.
Choose 'Include and close' to transfer it to an issue within a life domain.
Choose 'Exclude and close' if it is no longer required.

Casual service Brooke needs crisis accommodation, no beds available

Unmet need DV - Short term or emergency accommodation

Action * Include and close ▾

Issue * Domestic and family violence (Personal safety) ▾



If there are open services entered within the intake when you start a case plan, you will be prompted to either exclude and close the services or include them in the case plan.

If you include the services (as shown above) you will need to assign each service to a life domain.

Clicking save and continue on the case plan cover page will take you to the case plan summary page.

The plan summary page

The plan summary page (shown below) gives an overview of your case plan. The page is divided into **life domains**, under each life domain are the strengths, support networks and issues as identified during assessment.

You can navigate around the case plan by clicking either on the life domains, or issues in the left-hand menu, these can also be accessed from the case plan summary page.

For each issue a status an icon is displayed. For example, in the screenshot below you can see *services complete*, *no goal set* and *No services assigned* next to corresponding issues.

homeless²HOME Training H2H Generic Training East

Client > Case plan: plan summary

Client: Jamie Brown
 Client number: 55768061 (Active)
 Date of birth: 01/01/1974 (52)
 Lead agency: H2H Generic Training East

Case plan status: In progress

Life domains	Completion factor
Financial	Assessed risk indicator: High
Financial difficulties	No service assigned
Health & wellbeing	Assessed risk indicator: Medium
Mental health issues	No service assigned
Housing/accommodation	Assessed risk indicator: High
Housing crisis (e.g. eviction)	No service assigned
Personal safety	Assessed risk indicator: High
Domestic and family violence	No service assigned

Issues sit within life domains

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homeless²HOME Training H2H Generic Training East

Client > Case plan: plan summary

Client: Jamie Brown
 Client number: 55768061 (Active)
 Date of birth: 01/01/1974 (52)
 Lead agency: H2H Generic Training East

Case plan status: In progress

Life domains and issues	Current state of issue	Status icon
Financial	Assessed risk indicator: High	
Financial difficulties	No service assigned	🟢
Health & wellbeing	Assessed risk indicator: Medium	
Mental health issues	No service assigned	🟢
Housing/accommodation	Assessed risk indicator: High	
Housing crisis (e.g. eviction)	No service assigned	🟢
Personal safety	Assessed risk indicator: High	
Domestic and family violence	No service assigned	🟢







Life domains and issues appear in menu appear in same order as plan summary page

Current state of issue

Status icon

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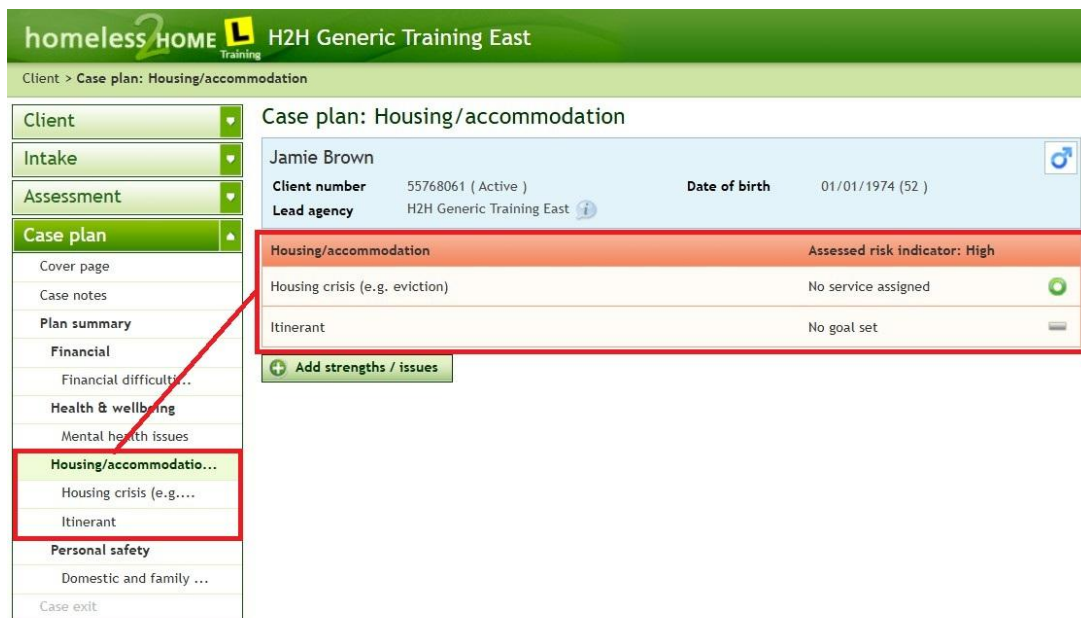
The status icons at the end of each issue row give a visual representation as to the status of that issue. See the chart below for an explanation of each icon.

Case plan summary icon definitions	
	All services have been completed for this issue
	Services entered for this issue are still open (incomplete)
	All services have been completed and the goal has been closed
	No goal has been set for this issue
	The goal has been closed for this issue, but no services were added
	Indicates an identified strength or support network



When you start your case plan, it contains only the life domains and issues that were entered at assessment.

Life domains

Within the case plan, each life domain displays the issues that sit within that life domain. Like the plan summary page, you can add further issues or strengths to the case plan from this page.



The screenshot shows the 'homeless HOME Training' interface for 'H2H Generic Training East'. The breadcrumb trail is 'Client > Case plan: Housing/accommodation'. The main content area displays the case plan for 'Jamie Brown' (Client number: 55768061, Date of birth: 01/01/1974). Under the 'Housing/accommodation' life domain, three issues are listed:

Issue	Assessed risk indicator	Status Icon
Housing/accommodation	High	
Housing crisis (e.g. eviction)	No service assigned	
Itinerant	No goal set	

A red box highlights the 'Housing/accommodation' life domain and its associated issues. A red arrow points from the 'Housing/accommodation' menu item in the left sidebar to the highlighted area in the main content area.

Strengths/issues pages

Every strength or issue within a case plan has its own page. These pages can be navigated to from the plan summary page, life domain pages or from the case plan menu.

The screenshot shows the 'Case plan: Housing/accommodation' page for client Jamie Brown. The left sidebar contains a 'Case plan' menu with options like 'Cover page', 'Case notes', 'Plan summary', and various life domains. The main content area shows a table with columns for 'Housing/accommodation' and 'Assessed risk indicator: High'. A table row lists 'Housing crisis (e.g. eviction)' with 'No service assigned' and 'Itinerant' with 'No goal set'. A red box highlights the 'Add strengths / issues' button in the sidebar. Three callout boxes provide instructions: 'click here to add new strengths/issues' points to the button; 'Issue/strength can be accessed directly through the case plan menu' points to the 'Housing crisis (e.g....)' menu item; and 'Issue/strength pages can also be accessed from within the life domain page' points to the 'Housing crisis (e.g. eviction)' table row.

Adding new strengths/issues to a case plan

You can add new strengths or issues to a case plan by clicking the *add strengths/issues* button on the plan summary page. Next, choose a life domain from the drop-down field and press *select*, as shown below;

The screenshot shows the 'Add strength/issue' page for client Jamie Brown. The left sidebar is the same as in the previous screenshot. The main content area has a heading 'Adding a strength or issue' and a sub-heading 'Select a life domain below to view the strengths and issues.'. Below this is a 'Life domain *' dropdown menu with a 'Select' button circled in red. The dropdown menu is open, showing a list of life domains: Behaviour, Cultural, Employment/education/training, Financial, Health & wellbeing (highlighted in blue), Housing/accommodation, Interpersonal relationships, Legal, Living skills, and Personal safety. A 'Cancel' button is also visible.

This will provide a list of issues within the life domain. The issues are set out in the same format as the assessment. To add an issue, tick the issue you want (as shown on next page) and complete the relevant fields.

You can add a goal for the issue via the *lookup goal* button. Setting a goal at this stage is not mandatory, but a goal must be set before services can be added.

Each life domain page has the risk indicator at the bottom of the page. For more information about the risk indicator see the [assessment](#) section

The screenshot shows the 'Add strength/issue' form for client Jamie Brown. The form is titled 'Add strength/issue' and includes a sidebar with navigation options like 'Client', 'Intake', 'Assessment', and 'Case plan'. The main content area shows client details: 'Client number 55770736 (Active)', 'Date of birth 01/01/1974 (52)', and 'Lead agency H2H Generic Training East'. Below this is a section for 'Adding a strength or issue' with a dropdown for 'Life domain' set to 'Health & wellbeing'. A list of health domains follows, each with a checkbox: 'Identified strengths', 'Support networks', 'Aged / Frail', 'Allergies', 'Child immunisation detail', 'Intellectual disabilities', 'Medical Issues', 'Medication', 'Physical disabilities', 'Problematic Alcohol Use', 'Problematic drug or substance use', and 'Recent hospitalisation'. The 'Smoker' section is highlighted in green and contains a checked checkbox, circled in red. Below it are fields for 'Is smoking effecting health?', 'Desire to quit?', and 'General detail'. A 'Goal' field shows 'There is no goal selected.' and a 'Lookup goal' button is circled in red. At the bottom, the 'Risk indicator' is set to 'Medium' and is also circled in red. The form concludes with 'Save and new', 'Save and close', and 'Cancel' buttons.

When you have finished adding details to the issue, select *save and new* to continue adding further issues or strengths to the case plan or *save and close* to return to the plan summary page.

The issue page

1	View the details of the issue by clicking <i>more</i> in the green banner
2	Add or change the set goal for this issue by clicking the <i>Add goal</i> or <i>Change goal</i> button
3	Goal Description can be edited at any time while the issue is open by clicking the <i>Edit</i> button
4	Record services provided, referred or unmet needs for the client by clicking the <i>Add service</i> button
5	Close the issue by clicking the <i>Close & save issue</i> button

homeless2HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation: Housing crisis (e.g. eviction)

Client Jamie Brown

Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

Lead agency H2H Generic Training East

Housing crisis (e.g. eviction) more +

Goal Housing Stability Change goal

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school. Edit

Service list
 Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected
 To close & save the issue all services and unmet needs must be completed. Add service

Unmet need
 No unmet needs identified for this issue.

Services
 No services have been entered for this issue.

Return to life domain Close & save issue

Goals

In order to add services to an issue in the case plan, a goal must be selected from the goals list. If there is no goal assigned to the issue, you will not be able to add services. This is indicated by the 'add service' button appearing greyed out, as shown below. You can add a text goal description to provide further context about the clients goals.

Interpersonal relationships: Relationship / family breakdown

Jamie Brown 

Client number 55770736 (Active) Date of birth 01/01/1974 (52)

Lead agency H2H Generic Training East 

Relationship / family breakdown more +

Goal *No goal has been defined for this issue* Select goal

Description Save Cancel

 **Service list**
Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected
To close & save the issue all services and unmet needs must be completed. Add service

Unmet need
No unmet needs identified for this issue.

Services
No services have been entered for this issue.

Return to life domain Close & save issue

Adding/changing a goal

A goal can be added or changed by clicking the *select goal* or *change goal* button within the issue screen. Clicking this button brings up the *select goal* pop up screen (as shown below). To select a goal, click the relevant choice. A goal can be changed an unlimited number of times.

Select goal

Goal

[Anger and mood management](#)

[Educational stability](#)

[Emotional stability](#)

[Employment stability](#)

[Establish independent living skills](#)

[Financial stability](#)

[Health Stability](#)

[Housing Stability](#)

[Housing stability following domestic or family violence](#)

[Housing stability following emergency accommodation](#)

Cancel

Closing and saving an issue

When an issue has been resolved or is no longer relevant to the client it can be closed. To do this click the *close and save issue* button on the issue screen.

The screenshot shows the software interface for H2H Generic Training East. The main header is green with the logo and text 'H2H Generic Training East'. Below the header, there is a breadcrumb trail: 'Client > Case plan > Interpersonal relationships: Relationship / family breakdown'. On the left, there is a navigation menu with categories like 'Client', 'Intake', 'Assessment', 'Case plan', 'Financial', 'Health & wellbeing', 'Housing/accommodatio...', 'Interpersonal relati...', 'Personal safety', and 'Case exit'. The main content area is titled 'Interpersonal relationships: Relationship / family breakdown' and shows details for a client named Jamie Brown. The client's information includes 'Client number 55770736 (Active)', 'Date of birth 01/01/1974 (52)', and 'Lead agency H2H Generic Training East'. Below this, there is a section for 'Relationship / family breakdown' with a goal 'Reconnect with family / friends' and a description 'client is working towards rebuilding relationships with their siblings.'. There are buttons for 'Change goal' and 'Edit'. A 'Service list' section is also visible, with an 'Add service' button. At the bottom right, the 'Close & save issue' button is circled in red.

A pop-up box will then appear asking if the goal has been met and a description of the outcome.

Complete the relevant fields and click the *Save and close issue* button to finalise.

The screenshot shows a pop-up box titled 'Close issue'. It contains an information icon and the text: 'You are about to close this issue. Once the issue has been closed, services can no longer be added to it. A closed issue can be re-opened using the re-open issue button.' Below this, there are two fields: 'Goal met *' with a dropdown menu and 'Outcome description' with a text input field. At the bottom, there are two buttons: 'Save & close issue' (circled in red) and 'Cancel'.

To summarise:

- A goal must be set before services can be added to an issue
- All services must be closed before the issue can be closed
- Closed issues can be re-opened if needed
- When closing an issue that has not had any services entered, you are limited to **no longer relevant** or **not at all** when recording if the goal has been met

Re-opening an issue

To re-open an issue that has been previously closed, navigate to the issue page in question and click the re-open issue button in the bottom corner (as shown below).

The screenshot shows the user interface for H2H Generic Training East. At the top, there is a green header with the logo 'homeless HOME Training' and the text 'H2H Generic Training East'. Below the header, a breadcrumb trail reads 'Client > Case plan > Interpersonal relationships: Relationship / family breakdown'. On the left side, there is a vertical navigation menu with several categories: Client, Intake, Assessment, Case plan, Financial, Health & wellbeing, Housing/accommodatio..., Personal safety, and Case exit. The main content area is titled 'Interpersonal relationships: Relationship / family breakdown' and contains the following information:

- Client:** Jamie Brown
- Client number:** 55770736 (Active)
- Date of birth:** 01/01/1974 (52)
- Lead agency:** H2H Generic Training East

Below this information, there is a section for 'Relationship / family breakdown' with the following details:

- Goal:** Reconnect with family / friends
- Description:** client is working towards rebuilding relationships with their siblings.
- Goal met:** No longer relevant

There is also a 'Service list' section with an 'Add service' button and an 'Unmet need' section stating 'No unmet needs identified for this issue.' At the bottom of the page, there are two buttons: 'Return to life domain' and 'Re-open issue'. The 'Re-open issue' button is circled in red.

Case plan goal status







At the end of each month, the case plan goal status is reported to the AIHW for all clients with an open case plan.

The goal status is set by looking at the number of issues in the case plan, and their completion status, to work out an overall achievement status of the case plan.

Examples of Case plan goal status during support	
Not at all	0/6 goals achieved
Up to half	1-2/6 goals achieved
Half or more	3-5/6 goals achieved
All	6/6 goals achieved

For example, the case plan shown below, with 2/4 issues closed as 'goal met', would have an overall goal completion status reported to the AIHW of goals achieved = half or more.

Case plan: plan summary

Ruby Evans 	
Client number	56679762 (Active)
Lead agency	H2H Agency 4
Date of birth	1990 (29)
Case plan status	In progress
Completion factor	25 %
Financial	Assessed risk indicator: High
Financial difficulties	Goal met 
Housing/accommodation	Assessed risk indicator: High
Housing crisis (e.g. eviction)	Goal met 
Itinerant	No goal set 
Interpersonal relationships	Assessed risk indicator: Medium
Relationship / family breakdown	Services incomplete 
 Add strengths / issues	

Case plan services

As with intake services, a case plan service is a way of recording the following;









- The services and assistance your agency provided to a client
- Any services and assistance provided by another SHS or mainstream provider
- Any services the client needs that cannot be provided (unmet needs)

Note: *an intake service and a case plan service are the same thing – a method of recording assistance provided to a client, but added from different stages of the client pathway.*

The add service function in case plan operates in the same way to the services function found in intake except for 3 features:

- **Case plan services** include a progress percentage that can be used if desired, a feature that **intake services** do not have
- **Case plan services** are added to the life domain and issue the assistance related to; this is different to **intake services**, which are collated in a single list
- [Service notes](#) can be added to an open case plan service

Once a case plan is opened all future services provided to a client are recorded as part of this case plan and the ability to enter services under the intake menu is removed. Below is a table defining the different types of icons that can be found on this issue screen.

Issue page icons and definitions	
	Edit service button.
	The service is still open (has not yet been closed and end date has not passed).
	Withdraw button. The service has been sent as a referral which has not yet been accepted and can be withdrawn if needed.
	Service has been closed and saved as 'completed'.
	Service has been closed and saved as 'entered in error'.
	Repeat service button (only available when the service is closed).
	Pending service referral that has not been accepted, or consented service notification not accepted by lead agency.
	Referred or consented service that has been rejected.

When to add a case plan service

A service should be recorded each time your client is provided with direct assistance, is assisted by another service provider, or an unmet need is identified.

To warrant a service being recorded, the client must have directly received something from your agency, another agency, or have an unmet need.

How to add a case plan service

To add a service, navigate to the relevant issue page within the case plan and click the *add service* button.

Note: the *add service* button is only available if a goal has been set for that issue.

The screenshot shows the 'Housing/accommodation: Housing crisis (e.g. eviction)' page. The left sidebar contains a navigation menu with 'Case plan' selected. The main content area displays client information for Jamie Brown (Client number: 55770736, Date of birth: 01/01/1974). Below this, a goal is defined: 'Housing Stability' with the description 'client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.' An 'Add service' button is circled in red. Other sections include 'Service list', 'Unmet need', and 'Services'.

the add service screen will appear (shown below). Case plan services are added the same way as intake services.

The screenshot shows the 'Housing crisis (e.g. eviction) : Add service' form. The left sidebar is the same as in the previous screenshot. The main content area shows the goal and description. Below this, there is a section for 'Adding or referring a service' with a 'Lookup service' button. The form includes fields for 'Delivery type *', 'Date requested *' (with a date picker set to 18/05/2026), and 'Service description *'. At the bottom, there are 'Save' and 'Cancel' buttons.


As with intake services, there are three delivery types;

Delivery type definitions	
Provided Service	<ul style="list-style-type: none"> • refers to a support service which is provided directly by your agency • All support provided should be recorded – even if the client does not acknowledge a need for services • Can be entered by either a lead or consented agency • You should only record that accommodation has been provided if you have provided the client with the actual accommodation e.g. agencies that have onsite crisis accommodation or medium term/transitional accommodation.
Referred service (within H2H or external to H2H)	<p>In the instances where you have arranged for a service to be provided to your client by another agency, this is recorded as a Service Referral. Referrals are either to internal agencies (those agencies that use H2H), or external agencies (those agencies that do not use H2H).</p> <ul style="list-style-type: none"> • You would enter a referred service if you refer a client to another service provider AND that service provider accepts the client for an appointment or interview • Do not complete a service referral if the client is NOT accepted for an appointment or interview. In that circumstance you would enter an ‘unmet need’ (see below) • You only record that accommodation has been referred if you referred the client to another service provider to provide the actual accommodation
Unmet need	<p>Used to record instances where a client needs a type of assistance that cannot be provided or referred.</p> <ul style="list-style-type: none"> • This refers to any services or assistance you assess the client as needing, whether or not the client accepts or agrees to participate in this support service. • Even when a service cannot be provided, it is important to record the client’s needs because this helps to identify unmet need.

Provided service

How to add a provided service

Select the provide service from the delivery type drop down menu as shown below;

homeless2HOME  **H2H Generic Training East**

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : Add service

Client ▼


Intake ▼

Assessment ▼


Case plan ▲

- Cover page
- Case notes
- Plan summary
- Financial**
- Financial difficulti...
- Health & wellbeing**
- Mental health issues
- Housing/accommodatio...
- Housing crisis (e.g....**
- Personal safety
- Domestic and family ...
- Case exit

Housing crisis (e.g. eviction) : Add service

Jamie Brown 


Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

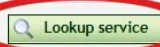
Lead agency H2H Generic Training East 

Housing crisis (e.g. eviction) [more +](#)

Goal Housing Stability

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.

 **Adding or referring a service**
Use the 'Lookup service' button to select the requested service and service element.

Delivery type Provide service ▼ 


Provided service

Provided service

Service element

Program


Provider H2H Generic Training East

Date requested *  dd/mm/yyyy

Response type *


Responsibility *

Service description *

Start date * 

End date *

Service progress %

Case worker Lachlan McConnochie 

Next click the *lookup service* button (as shown above). The provided service lookup box will then appear (as shown below). Make the relevant selection based upon the service and service element you have provided and click the *select* button.

Provided service lookup

My agency

Provided service

- Gen - Advice/information
- Gen - Advocacy/liaison on behalf of client
- Gen - Assistance to connect culturally**
- Gen - Assistance to obtain / maintain government allowance
- Gen - Assistance to prevent foreclosures or for mortgage arrears
- Gen - Assistance to sustain tenancy or prevent tenancy failure or eviction
- Gen - Assistance with challenging social/behavioural problems

Service element

- Early intervention - Gen - Assistance to connect culturally (Outer Southern Gener
- Homeless children's support - Gen - Assistance to connect culturally (Outer South
- In centre support - Gen - Assistance to connect culturally (Outer Southern Gener**
- Outreach support - Gen - Assistance to connect culturally (Outer Southern Gener

Select Cancel

Note: the list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency is part of an alliance. If you are unsure which service element to choose for the clients' particular circumstance, speak to your team leader or manager. You can find definitions for each service element at the end of this user guide.

This will return you to the *add service* screen with the first four fields now pre-filled based upon the information you selected (as shown below).

Complete the remaining fields on the screen;

homeless2HOME H2H Generic Training East

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : Add service

Client Jamie Brown
Intake
Assessment
Case plan

Housing crisis (e.g. eviction) : Add service

Client number 55770736 (Active) Date of birth 01/01/1974 (52)
 Lead agency H2H Generic Training East

Housing crisis (e.g. eviction) more +

Goal Housing Stability
 Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.

Adding or referring a service
 Use the 'Lookup service' button to select the requested service and service element.

Delivery type * Provide service

Provided service

Provided service GEN - Retrieval/storage/removal of personal belongings
 Service element Outreach support - GEN - Retrieval/storage/removal of personal belongings
 Program H2H Generic Training - East
 Provider H2H Generic Training East

Date requested * 18/05/2026 dd/mm/yyyy
 Response type *
 Responsibility *
 Service description *

Start date * 18/05/2026
 End date *
 Service progress %

Case worker Lachlan McConnochie

Is it the clients or the workers responsibility to follow the service through?

Write specific information about what was provided e.g. 'spent time with client making enquiries about...'

The service progress field is an optional case management tool for recording the success of the service.

What date did the service end? was it a once off service (same start & end date) or extended period such as accommodation services?

You can change who the service is assigned to here

- To save the service but leave it open select the save button on the left as shown below. You would do this if the service has an end date in the future
- The service will close automatically as 'fully completed' when it passes its set end date
- To save the service and immediately close it as completed, select the 'save & close service' button on the right as shown below

End date * 18/05/2026
 Service progress %

Case worker Lachlan McConnochie

If you select save & close the service the following pop up will appear; complete the closing reason and end date to continue.

Close service

Confirmation
 You are about to close this service
 Once the service has been closed, it can no longer be edited.

Closing reason * ▼

End date * 18/05/2026 📅 dd/mm/yyyy

Close & save service
Cancel

Closing and saving the service returns you to the issues page. The entered service will appear in the service list (shown below).

Services					
Date requested	Description	Provided service	Action	Status	
18/05/2026	discussed client changed circumstances with Centrelink	GEN - Assistan obtain/maint allowance	✎	🟢	Status indicates the service has been saved and closed
18/05/2026	arranged for clients belongings to be collected from previous accommodation and stored	GEN - Retrieval/ of personal belo	✎	🟢	Status indicates the service is still open

Return to life domain
Close & save issue


Editing a provided service

Open services can be edited by clicking the edit pencil at the end of the relevant row. Once a service has passed its end date it can no longer be edited. The only information that can be edited once a service has been added is the following;

- Date requested
- Responsibility
- Start date
- End date

Repeating a service

Closed services will display a repeat icon instead of an edit pencil.

18/05/2026	discussed client changed circumstances with Centrelink	GEN - Assistance to obtain/maintain government allowance	H2H Generic Training East	
------------	--	--	---------------------------	---

Repeating a service is a quick way to record any assistance that may have been provided to your client more than once. Using this function pre-fills many of the fields that you enter when adding a new service.

Example:

You provided transport to take your client to a doctors appointment on Monday. On Wednesday your client requires transport again to a follow-up appointment.

In the example above the service of 'transport' would have already been entered on Monday. Rather than entering a new service on Wednesday, you could click the repeat service button that corresponds to Mondays transport service.

Consented services

Consented services allow agencies to record their co-case management. For the non-lead agency to add a service to the lead agency's case plan, some initial steps must be completed first.

The lead agency should

- select which issue(s) the consented agency will be supporting the client in
- from that issue(s), complete an internal service referral to the consented agency
- the consented agency manager must then accept the referral, and assign to the worker who will be assisting the client
- once this has been completed, the worker/agency manager will be able to add additional provided services as needed
- each service generates a notification back to the lead agency, which must be accepted (see [referrals menu section](#) for further detail)

Referrals within H2H (internal referrals)

Internal referrals are used to record where the client is provided with assistance by another SHS agency.

How to add an internal referral

To send a service referral to another agency that uses H2H, use the *referral within H2H* function. To do this click into any issue page within the case plan and click the *add service* button. As discussed earlier, the *add service* button is only available if a goal has been set for that issue.

On the *add service* screen, choose *Referral within H2H* from the *Delivery type* drop down field (as shown below).

The screenshot shows the 'Housing crisis (e.g. eviction) : Add service' interface. On the left is a navigation menu with 'Case plan' selected. The main content area includes client details for Jamie Brown, a goal of 'Housing Stability', and a description of the client's need for a long-term rental unit. The 'Adding or referring a service' section contains a 'Delivery type' dropdown menu, which is circled in red and currently shows 'Referral within H2H (NAHA)'. Below this are fields for 'Service referral' details, including 'Reason for referral', 'Contact name', 'Email address', 'Phone #', and 'Fax #'. There are also date pickers for 'Date requested' (18/05/2026), 'Start date' (18/05/2026), and 'End date', along with dropdowns for 'Response type', 'Responsibility', and 'Service progress'. At the bottom, there are buttons for 'Send' and 'Cancel', and a 'Preview referral form' button.

Click the *lookup service* button and the *referred service lookup* box will appear. Select the service you are referring from the top section, and the agency you are sending the referral to in the bottom section and click the *select* button.

Referred service lookup

My region Service Selection

Provided service

- First Nations - Assistance for family/domestic violence - victim support services
- First Nations - Assistance for incest/sexual assault
- First Nations - Assistance for trauma
- First Nations - Assistance to connect culturally
- First Nations - Assistance to obtain/maintain government allowance
- First Nations - Assistance to prevent foreclosures or for mortgage arrears
- First Nations - Assistance to sustain tenancy or prevent tenancy failure or evictio
- First Nations - Assistance with challenging social/behavioural problems
- First Nations - Assistance with immigration services

Agency

- Kurlana Tampawardli
- Toward Home: Wardli-Ana
- Western Aboriginal Specific Homelessness Service

Select Cancel

receiving agency selection

Note: ensure you select the correct prefix for the agency you are referring to; e.g. if you were referring a client to a domestic violence service for counselling, you would select the 'DV' prefix.

You will then be returned to the *add service* screen. The contact name, email address and phone number of the receiving agency are now pre-filled. These fields can be edited.

Complete the remaining fields and then click the *add consent* button located in the bottom right hand corner of the screen.

Consent required
The client should provide consent to share and exchange information with the selected provider.

Add consent

The *add consent* pop-up box will then appear (as shown below). Complete the consent type, agreement and expiry date fields and click the *save* button.

Add consent

Date granted 18/05/2026

Granted at H2H Generic Training East

Consent type * Verbal

Client agreement * Yes

Consented agencies • Kurlana Tampawardli

Expiry date * 18/11/2026 dd/mm/yyyy

Save Cancel

Once consent is added and all fields are completed, click the *send* button at the bottom of the page (as shown below). This will return you to the issue page.

homeless HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : Add service

Client

Jamie Brown

Client number 55770736 (Active) Date of birth 01/01/1974 (52)

Lead agency H2H Generic Training East

Housing crisis (e.g. eviction) : Add service

Goal Housing Stability

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.

Adding or referring a service
Use the 'Lookup service' button to select the requested service and service element.

Delivery type * Referral within H2H (NAHA) Lookup service

Service referral

Provided service First Nations - Assistance to connect culturally

Provider Kurlana Tampawardli

Reason for referral * assistance to client to maintain connections to mob

Contact name * Duty Worker

Email address * h2h@sa.gov.au

Phone # 98 7654 3210 Fax #

Date requested * 18/05/2026 dd/mm/yyyy

Response type * Case Plan

Responsibility * Client

Service description * Service description

Start date * 18/05/2026

End date * 18/05/2026

Service progress %

Consent for information sharing
The client has granted consent to share and exchange information with the selected provider.

Preview referral form
Preview the PDF referral form that will be automatically emailed to the provider. Preview referral form

Send Cancel

The service referral will appear in the list of services with a status of *pending* until it is accepted by the receiving agency.

While the service is pending you can withdraw the referral by clicking the blue *withdraw* button in the *action* column (as shown below).

The screenshot shows the 'homeless2HOME Training' interface for 'H2H Generic Training East'. The breadcrumb trail is 'Client > Case plan > Housing/accommodation: Housing crisis (e.g. eviction)'. The left sidebar lists various case plan categories, with 'Housing crisis (e.g....)' selected. The main content area displays client details for Jamie Brown (Client number: 55770736, Date of birth: 01/01/1974) and a goal of 'Housing Stability'. Below the goal is a description: 'client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.' A 'Service list' section provides instructions on adding services. An 'Unmet need' section states 'No unmet needs identified for this issue.' The 'Services' table lists three entries, with the first one having a 'Withdraw service button' highlighted by a red box and arrow.

Date requested	Description	Provided service	Provider	Action	Status
18/05/2026	Service description	First Nations - As connect cultural		Withdraw service button	
18/05/2026	discussed client changed circumstances with Centrelink	GEN - Assistance to obtain/maintain government allowance	H2H Generic Training East		
18/05/2026	arranged for clients belongings to be collected from previous accommodation and stored	GEN - Retrieval/storage/removal of personal belongings	H2H Generic Training East		

Note: once a service referral has been accepted, it is the responsibility of the provider (the consented agency) to save and close the service, or wait for it to close automatically once the end date passes.

Referrals external to H2H

External referrals are used to record where the client is assisted by an agency who does not use H2H (e.g. mainstream services such as health, employment services, etc.)

How to add an external referral

Similar to service referrals to internal agencies, you can record referrals to external agencies. External agencies are those that provide services to clients but do not use H2H and cannot accept referrals or view information through H2H.

Firstly, select 'Referral external to H2H' from the delivery type drop down box.

The screenshot shows the 'homeless HOME' logo and 'H2H Agency 4' in the top left. Below the logo is a breadcrumb trail: 'Client > Case plan > Housing/accommodation > Itinerant : Add service'. On the left is a navigation menu with categories: Client, Intake, Assessment, Case plan (expanded), Financial, Housing/accommodation, Itinerant (selected), Interpersonal relations, and Case exit. The main content area is titled 'Itinerant : Add service' and displays client information for Ruby Evans (Client number: 56679762, Date of birth: 1990, Lead agency: H2H Agency 4). Below this is a 'Goal' field with the text 'Housing stability following sleeping rough'. An information box states: 'Adding or referring a service. Use the 'Lookup service' button to select the requested service and service element.' The 'Delivery type' dropdown menu is open, showing four options: 'Provide service', 'Referral within H2H (NAHA)', 'Referral external to H2H' (highlighted), and 'Unmet need'. There is also a 'Lookup service' button. At the bottom are 'Save' and 'Cancel' buttons.

Select the type of service from the 'Service' drop down box, and complete the remaining fields;

The screenshot shows the 'Housing crisis (e.g. eviction) : Add service' form. The 'Service' dropdown menu is highlighted with a red arrow and a box containing the text: "Sends referral but leaves the service open (e.g. then end date is in the future)". The 'Provider' field is highlighted with a red box and contains the text: "Sends referral and closes the service (e.g. when end date is today or in the past)". The 'Add consent' button is circled in red. The 'Send and accept' and 'Save & close service' buttons are also highlighted with red boxes.

The next field is the 'Provider' field. If the agency you are referring to is listed select the agency, if not choose the '-----not listed-----' option.

Note: the provider field will list any currently consented agencies. If you have not sent any referrals yet for this client, then no list will appear.

Complete the 'reason for referral' section and enter the contact details of agency/worker you are referring to. Complete the responsibility, service description and the requested, start and end date fields.

If no current consent with the agency exists, click the *Add consent* button at the bottom of the screen and complete the pop-up (see [consents](#) for more information).

The referral is now ready to send. The send button is labelled 'Send and accept' rather than just 'send'. This is because you are sending an external referral to an agency that does not use H2H and cannot the referral within the H2H system. By pressing the *send and accept* button you are acknowledging that the provider has already assisted, or has agreed to assist the client.

Unmet need – case plan

Aside from entering provided and referred services within H2H, you can record services that a client may need, but cannot be provided. If an unmet need can later be provided it can be converted to either a provided or a referred service.

Unmet need should be entered when a client needs a particular service, and also when the client does not accept the offer of a particular service, e.g. a client with a drug issue who is not ready to address the issue or refuses assistance.

For further information on unmet needs see the section in [Presenting unit and services](#).

How to record an unmet need in case plan

Select the issue in the case plan where you wish to record the unmet need, then the *add service* button. Within the *Delivery type* drop down box select the *unmet need* option.

You will need to select the unmet need for the client, followed by the prefix. If the unmet need is for a service that your agency will eventually provide, select the prefix that matches your agency target group. If another SHS or an external provider will be providing the service in the future, select their corresponding prefix.

Delivery type *

Service requested *

Service prefix *

Date requested *

Service description *

Case worker *

Example: if your client has just fled a violent relationship, and requires emergency accommodation but none is available, you may choose to enter an unmet need of **Short term/emergency accommodation, with a prefix of DV**.

Note: *unmet needs that can be provided at a later point in time can be converted. The ability to convert is dependant upon the prefix chosen. Continue reading for further detail.*

Complete the remaining mandatory fields, and select the save button. You will then be directed back to the issues page and the unmet need you entered will appear at the top of the page.

Service list
 Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected
 To close & save the issue all services and unmet needs must be completed.
 + Add service

Unmet needs		
Unmet need	Service description	Date requested
DV - Assistance for family/domestic violence - victim support services	Ruby needs counselling for DV but no appointments available	06/11/2019

How to close an unmet need

If you have recorded an unmet need that was incorrect, or is no longer needed by the client, close it by clicking anywhere on the service to open it.

Select the 'close and save' button and record the reason you are closing the unmet need.

Close service

Confirmation
 You are about to close this service
 Once this service has been closed, it can not be modified.

Closing reason * ▼

Close & save se
Cancel

Converting an unmet need to a provided or referred service

If you are now able to meet the need for your client, you can convert the original unmet need to either provided or referred. This indicates that a need that had once been unmet, is now met.


To convert an unmet need, click on the edit pencil at the end of its row on the issue screen. This will take you to the 'edit service' screen. This will enable you to convert the service using the 'Delivery type' drop down menu (as shown below).

Service list
 Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected
 To close & save the issue all services and unmet needs must be completed.
 + Add service

Unmet needs		
Unmet need	Service description	Date requested
Ext - Mental health services	Jamie needs psychologist support but there are none currently available in the area	19/05/2026

This will take you to the *edit service* screen. Convert the service using the *Delivery type* drop down menu.

When converting an unmet need, you may be restricted in your choice of delivery type. This is indicated by a choice within the menu being greyed out (as shown in the screenshot below). A delivery type might be greyed out if your agency does not provide this service.

Client	Itinerary: edit service			
Intake	Ruby Evans 			
Assessment	Client number	56679762 (Active)	Date of birth	1990 (29)
Case plan	Lead agency	H2H Agency 4		
Cover page	Itinerary more +			
Case notes	Goal	Housing stability following sleeping rough		
Plan summary	Delivery type *	Unmet need	<input type="button" value="Lookup service"/>	
Financial	Unmet need	Provide service		
Financial difficulti...	Requested service	Referral within H2H (NAHA)	stic violence - victim support services	
Housing/accommodatio...	Date requested *	Referral external to H2H		
Housing crisis (e.g....	Response type	Unmet need		
Itinerary	Service description	Ruby needs counselling for DV but no appointments available		
Interpersonal relati...	Case worker	Kirsten Moyle <input type="button" value="Change case worker"/>		
Relationship / famil...	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Close & save service"/>			
Case exit				

Example: In the above scenario, the client needed assistance for family/domestic violence. When attempting to convert the only option is to refer the service, either internally or externally. It cannot be converted to a provided service because the current lead agency is a generic (GEN) agency and not funded to provide DV services.

What can I do if I cannot convert the unmet need to a 'provided service'?

As in the example above, if you have entered an unmet need that you cannot convert to a provided service it means that you have chosen a service that your agency is not funded to provide. In this case, you can either:

- *Delete the original unmet need and re-enter it with a Prefix that your agency provides (e.g. 'Gen' for generic funded agencies)*
- or*
- *Convert it to a service referral*

Once you have established the delivery type you will be converting to, select it from the delivery type drop down, complete all mandatory fields, and save the service. You will be returned to the issue page and see that the unmet need has been converted to the newly created provided or referred service in the service list.

Other functions

Editing a service

To edit any service or unmet need, click the issue screen that contains the relevant service and click the corresponding edit pencil (as shown below).

Only open services can be edited. Referred services that are pending or closed services will show a different icon.

homeless HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation: Housing crisis (e.g. eviction)

Client

Intake

Assessment

Case plan

Cover page

Case notes

Plan summary

Financial

Financial difficulti...

Health & wellbeing

Mental health issues

Housing/accommodatio...

Housing crisis (e.g....

Personal safety

Domestic and family ...

Case exit

Housing/accommodation: Housing crisis (e.g. eviction)

Jamie Brown

Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

Lead agency H2H Generic Training East

Housing crisis (e.g. eviction) more +

Goal Housing Stability [Change goal](#)

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school. [Edit](#)

Service list

Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected

To close & save the issue all services and unmet needs must be completed. [Add service](#)

Unmet needs		
Unmet need	Service description	Date requested
Ext - Mental health services	Jamie needs psychologist support but there are none currently available in the area	19/05/2026

Services					
Date requested	Description	Provided service	Provider	Action	Status
18/05/2026	Service description	First Nations - Assistance to connect culturally	Kurlana Tampawardli		
18/05/2026	discussed client changed circumstances with Centrelink	GEN - Assistance to obtain/maintain government allowance	H2H Generic Training East		
18/05/2026	arranged for clients belongings to be collected from previous accommodation and stored	GEN - Retrieval/storage/removal of personal belongings	H2H Generic Training East		

[Return to life domain](#)
[Close & save issue](#)

Repeating a service

Once a service is closed the *repeat* button becomes available. This button is a quick and simple way to repeat a service that has been previously entered. To repeat a service, click the repeat icon

homeless HOME Training **H2H Generic Training East**

Client > Case plan > Housing/accommodation: Housing crisis (e.g. eviction)

Client

Intake

Assessment

Case plan

- Cover page
- Case notes
- Plan summary
- Financial**
 - Financial difficulti...
- Health & wellbeing**
 - Mental health issues
- Housing/accommodatio...**
 - Housing crisis (e.g....**
 - Personal safety
 - Domestic and family ...
 - Case exit

Housing/accommodation: Housing crisis (e.g. eviction)

Jamie Brown ♂

Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

Lead agency H2H Generic Training East i

Housing crisis (e.g. eviction) more +

Goal Housing Stability Change goal

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school. Edit

Service list Add service

Use the 'Add service' button to record assistance or unmet needs. This button will only be available if a goal has been selected

To close & save the issue all services and unmet needs must be completed.

Unmet needs

Unmet need	Service description	Date requested
Ext - Mental health services	Jamie needs psychologist support but there are none currently available in the area 	19/05/2026

Services

Date requested	Description	Provided service	Provider	Action	Status
18/05/2026	Service description	First Nations - Assistance to connect culturally	Kurlana Tampawardli		
18/05/2026	discussed client changed circumstances with Centrelink	GEN - Assistance to obtain/maintain government allowance	H2H Generic Training East		
18/05/2026	arranged for clients belongings to be collected from previous accommodation and stored	GEN - Retrieval/storage/removal of personal belongings	H2H Generic Training East		

Return to life domain
 Close & save issue

You will then be directed to a *repeat service* page. The page is pre-filled with most of the details of the service being repeated. All that is required to complete is to add a service description and end date and click *Save* or *Save & close service*.

homeless? HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : repeat task

Client Housing crisis (e.g. eviction) : repeat task

Intake Jamie Brown

Assessment Client number 55770736 (Active) Date of birth 01/01/1974 (52)

Case plan Lead agency H2H Generic Training East

Housing crisis (e.g. eviction) more +

Goal Housing Stability

Description client is aiming to get a long term private 2br rental unit within 5 kms of their childrens school.

Delivery type * Provide service

Provided service

Provided service GEN - Assistance to obtain/maintain government allowance

Service element In centre support - GEN - Assistance to obtain/maintain government allowance

Program H2H Generic Training - East

Provider H2H Generic Training East

Date requested * 19/05/2026 dd/mm/yyyy

Response type * Case Plan

Responsibility * Client

Service description

Start date * 19/05/2026

End date

Service progress 0 %

Case worker Lachlan McConnochie

Service details are pre-filled

You need to add a service description

The end date must be completed

The case plan cover page

The case plan cover page allows you to view details regarding a case plan such as who created it and the date and time it was created. From this page you can also print your case plan and case notes, set review date reminders and create a case exit. Further details about exiting your client from case plan can be found in the [end support/case exit](#) section.

homeless HOME Training H2H Generic Training East

Client > Case plan: cover page

Client: Jamie Brown
Client number: 55770736 (Active)
Date of birth: 01/01/1974 (52)
Lead agency: H2H Generic Training East

Intake: 02/04/2025
Assessment: 02/04/2025
Case plan: 02/04/2025

Update the next review date
If a date is entered and saved, a reminder will automatically appear on the case manager's home page.

Created by: Lachlan McConnochie (H2H Generic Training East)

Date created: 02/04/2025
Time created: 02:08 PM
Client agreed: Yes
Client signed: Yes
Date of agreement: 02/04/2025

Next review date: No date specified [Update]

Case plan type: Specialist Homelessness Services sector

View plan summary [Export to PDF] [Case exit]

Setting a review date

To set a case plan review date, click the *update* button on the case plan cover page. You will notice the screen change to include a date field and *save* and *cancel* buttons. Click the calendar icon, select a date and press the *save* button (as shown below).

Setting a review date will prompt you to review your case plan by providing a reminder on your home screen.

homeless HOME Training H2H Generic Training East

Client > Case plan: cover page

Client: Jamie Brown
Client number: 55770736 (Active)
Date of birth: 01/01/1974 (52)
Lead agency: H2H Generic Training East

Intake: 02/04/2025
Assessment: 02/04/2025
Case plan: 02/04/2025

Update the next review date
If a date is entered and saved, a reminder will automatically appear on the case manager's home page.

Created by: Lachlan McConnochie (H2H Generic Training East)

Date created: 02/04/2025
Time created: 02:08 PM
Client agreed: Yes
Client signed: Yes
Date of agreement: 02/04/2025

Next review date: [Calendar icon] dd/mm/yyyy [Save] [Cancel]

Case plan type: Specialist Homelessness Services sector

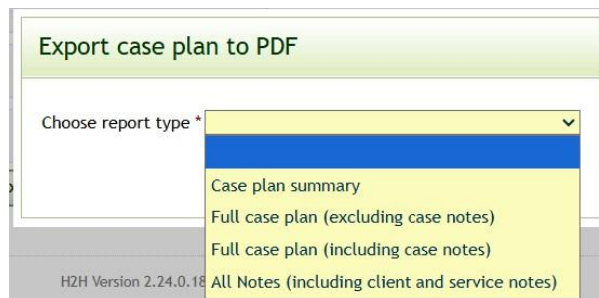
View plan summary [Export to PDF] [Case exit]

May 2026
Mo Tu We Th Fr Sa Su
27 28 29 30 1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31

Printing a case plan and case notes

H2H provides the ability to view your case plan for printing. This can be done with or without your case notes attached, or you can extract all of the notes as a separate PDF.

To view your case plan in PDF format, click the *export to PDF* button found on the case plan cover page. The following pop-up box will be displayed.



Choose the type of report you want to print (Full, summary, with or without case notes and All notes) and click the *export to PDF* button. This will generate a PDF version of your selection. To print, select the print option in your PDF reader program.

Creating a case exit

For information on the case exit function, refer to the [end support / case exit section](#).

Case notes and service notes

The case notes page is where you can enter case or service notes on your client record. A case note is a generic note that is in relation to the case management of your client, and a service note is a note that is attached to a specific service in your case plan. Notes can also be entered from the notes screen in the client menu. See the [notes section](#) for further detail

Case notes belong as part of the case plan and therefore can only be entered or read by workers within the lead agency who have access to the case plan.

Note: notes can only be edited or deleted until midnight on the day they were created.

Service notes can be written by a consented agency where they have assisted a client as a non-lead agency, or by the lead agency. Unlike case notes, service notes can be added from two places in the case plan. See below for instructions on how to enter both types of notes.

Adding a service note

A service note can be entered on the case notes page, or from the service in the case plan.

To add from a case plan service, click the service and then click the *add service note* button found at the bottom of that page (as shown below).

The screenshot displays the 'H2H Generic Training East' system interface. The top navigation bar shows the breadcrumb: 'Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : view service'. On the left, a sidebar menu lists various categories, with 'Housing crisis (e.g....)' highlighted. The main content area shows details for a service provided to 'Jamie Brown'. Key information includes: Client number 55770736 (Active), Date of birth 01/01/1974 (52), and Lead agency H2H Generic Training East. The service details are: Delivery type 'Provide service', Date created '19/05/2026', Provided service 'GEN - Assistance to obtain/maintain government allowance', Service description 'Discussed Jamie's changed situation with Centrelink', and Goal 'Housing Stability'. Additional details include Date requested '19/05/2026', Responsibility 'Client', Start date '19/05/2026', End date '19/05/2026', Service progress '0%', and Case worker 'Lachlan McConnochie'. At the bottom, there is a 'Service notes list' section with the text 'There are no service notes.' and a red circle highlighting the '+ Add service note' button. Other buttons at the bottom include 'Edit service', 'Return to issue', and 'Close & save service'.

Next, set the date and time and write your note, press the *save and close* button to return to the previous screen.

Saving your note – system timeout

For security reasons H2H has a 20 minute timeout feature. If no button within H2H has been clicked for a period of 20 mins the timeout feature will activate and you will be logged out of the system. As a result any unsaved service and case notes will be lost.

homeless²HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction): add note

Client

Intake

Assessment

Case plan

Cover page

Case notes

Plan summary

Financial

Financial difficulti...

Health & wellbeing

Mental health issues

Housing/accommodatio...

Housing crisis (e.g....

Personal safety

Domestic and family ...

Case exit

Add note

Jamie Brown

Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

Lead agency H2H Generic Training East

Life domain Housing/accommodation

Goal Housing Stability

Service description Discussed Jamie's changed situation with Centrelink

Provided service GEN - Assistance to obtain/maintain government allowance

Case worker Lachlan McConnochie

Date created 19/05/2026 11:21 AM **Time created *** 11:21 AM hh:mm

Note type * Saves your note and allows you to continue typing. Clicking the save button will reset the systems timeout countdown

Notes * Saves your note and returns you to the previous screen. Notes that are saved and closed are no longer editable and cannot be deleted

Save
 Save & close
 Cancel

All service notes will appear in order underneath the service on the relevant *view service* screen (as shown on next page). Service notes also appear in the notes list within the *Case notes* page, and on the *notes* screen in the client menu.

homeless²HOME Training H2H Generic Training East

Client > Case plan > Housing/accommodation > Housing crisis (e.g. eviction) : view service

Client

Intake

Assessment

Case plan

Cover page

Case notes ←

Plan summary

Financial

Financial difficulti...

Health & wellbeing

Mental health issues

Housing/accommodatio...

Housing crisis (e.g....

Personal safety

Domestic and family ...

Case exit

Housing crisis (e.g. eviction) : view service

Jamie Brown

Client number 55770736 (Active) **Date of birth** 01/01/1974 (52)

Lead agency H2H Generic Training East

Delivery type Provide service

Added service notes will also appear on the case notes page

Provided service GEN - Assistance to obtain/maintain government allowance

Service description Discussed Jamie's changed situation with Centrelink

Goal Housing Stability more +

Date requested 19/05/2026

Responsibility Client

Start date 19/05/2026

End date 19/05/2026

Service progress 0 %

Case worker Lachlan McConnochie

Service notes list + Add service note

Date	Author	Agency	Note
19/05/2026 11:21	Lachlan McConnochie	H2H Generic Training East	Service notes provide more detail or important information about the service. Service notes pro...

Edit service
 Return to issue
 Close & save service

Adding a case note

Case notes are added through the *case notes* page in the case plan menu by clicking the *add note* button.

Case notes

Brown Bear
 Client number: 55711722 (Active) Date of birth: 01/01/2000 (26)
 Lead agency: H2H Generic Training East

Search notes:
 Note type:
 Author:
 Agency:
 Date created: yyyy

Results: 1-15 of 22

Date	Type	Author	Agency	Note
28/04/2026 09:15	Service note	Lachlan McConnochie	H2H Directly Contracted Agency South	first service note by consented a...
28/04/2026 09:06	Service note	Lachlan McConnochie	H2H Directly Contracted Agency	the consented agency can then add...

homeless2HOME Training H2H Generic Training East

Client > Case plan > Case notes: add note

Add note

Brown Bear
 Client number: 55711722 (Active) Date of birth: 01/01/2000 (26)
 Lead agency: H2H Generic Training East

Date created * dd/mm/yyyy Time created * hh:mm

Note type *

Contact type * Who *

Notes *

Enter the date/time, type of note, contact type and who was involved and write your note, press the *save and close* button, this returns to the previous notes page. The same 20-minute timeout feature applies to case notes as elsewhere in H2H therefore ensure you save your note often to avoid losing your work.

Adding a service note from the case notes screen

Service notes can also be added from the case notes screen by selecting service note in the note type drop down box and joining it to a service by completing the relevant fields that appear.

Searching notes

At the top of the case notes page there are various search fields that can be used to locate notes previously entered onto H2H. You can use these fields to search results based on your criteria.

You can search by the type of note, author, agency and/or the month and year it was written.

Enter your search criteria, click the 'search' button. Search results will appear directly underneath. If no search results are found, the screen will display 'there are no notes for this client'

On the following page there is an example of the various fields that can be used for searching.

The screenshot shows the 'Case notes' interface for a client named 'Brown Bear'. The search filters are highlighted with a red box:

- Search notes:
- Note type:
- Author:
- Agency:
- Date created: yyyy

Buttons for 'Search' and 'Clear' are visible below the filters. The results show 'Results: 1-3 of 3'.

Below the filters is a 'Notes list' table with columns: Date, Type, Author, Agency, and Note. The first three rows are visible:

Date	Type	Author	Agency	Note
28/04/2026 09:15	Service note	Lachlan McConnochie	H2H Directly Contracted Agency South	first service note by consented a...
28/04/2026 09:06	Service note	Lachlan McConnochie	H2H Directly Contracted Agency South	the consented agency can then add...
28/04/2026 09:02	Service note	Lachlan McConnochie	H2H Directly Contracted Agency South	once the internal referral has be...

A red callout box points to the 'Search results appear here' text in the left-hand navigation menu.

Closing the case plan

To create a case exit for your client you must:

- Close all open services
- Check all referred or consented services are accepted and closed – if not contact the consented agency and ask them to close any outstanding services
- Close all issues

A case plan that is ready to be closed should look similar to this;

homeless²HOME Training Outer Southern Generic Homelessness Service

Client > Case plan: plan summary

Client: Robert Brown (Bob)

Client number: 55670081 (Active) Date of birth: 25/6/1966 (50)

Lead agency: Outer Southern Generic Homelessness Service

Case plan status: In progress Completion factor: 6%

Health & wellbeing	Assessed risk indicator: Medium
Mental health issues	Goal met ✓
Problematic drug or substance use	Goal met ✓

Housing/accommodation	Assessed risk indicator: High
Housing crisis (e.g. recently evicted)	Goal met ✓

Living skills	Assessed risk indicator: Medium
Household management	Goal met ✓

+ Add strengths / issues

Once each issue (and its corresponding goal) has been closed, you are ready to close your clients support period.

homeless²HOME

SYSTEM CLOSE, END SUPPORT & CASE EXIT

System closes

Clients records with no activity for more than one calendar month (over 30 days), are at risk of being closed automatically by the System close function.

The system close function only operates on clients without a case plan, with a status of Casual or assessed. At the end of the month, these clients will be automatically closed by the system and their record set to inactive. This type of closure is known as a 'System Close'.

'Activity' consists of adding a service, or completing a pathway item (such as creation of an intake or assessment).

***Note:** for casual or assessed clients that are closed by 'System close', an exit will be automatically completed. All fields within the exit will be set by default to 'don't know'. These types of exits are visible in agency reporting outcomes and are monitored closely as part of agency performance management. System closes should be avoided wherever possible by monitoring the home page carefully.*

You can avoid system closes by regularly checking the 'clients without activity' item in your [inbox](#).

Exiting a client

Once support of a client has ended the client record on H2H needs to be closed off to make the record inactive. You will need to update information about the client's circumstances at the end of support. To do this you need to either complete an 'end support' or 'case exit'.

***Note:** always ensure you have as much detail as possible about your client's circumstances on exit. Accurate end support/case exit information is crucial to rerecording outcomes for the client.*

End support is used where the client has a status of either casual or assessed (they have had an intake or assessment).

Case Exit is used to exit a client who has a case plan.

Differences between end support and case exit

The End support and Case exit functions are identical except for one question.

Within an End support you are asked the reason why no case plan was created, in Case exit you are asked to what extent were the clients goals achieved.

End Support

Reason for no case plan *

Homelessness type in

Sleeping rough

Client did not agree to one
Service episode too short
Other - please specify

Case Exit

What extent the goals achieved? *

Homelessness type in

Sleeping rough

Short term or emergency accommodation, due to a lac

Completely
Not at all
To some extent
Mostly
Completely

Starting an end support or case exit

The end support can be completed at the following stages:

- After an Intake has been completed and one or more services provided (either by the Lead Agency or referred to another agency)
- After an Assessment has been completed regardless of whether a service was provided or not

Note: if a client has a current case plan, the 'End support' function will not be available. Instead, use the Case exit function.

When clicking on *End support* you will be taken to the cover page. On this screen the system will advise you if there are any outstanding services or assessments in progress. If you choose to continue with the end support all outstanding items will be closed.

homeless HOME Training H2H Generic Training East

Client > End support > End support: cover page

Client: Barry Babber

Client number: 55769204 (Casual)

Lead agency: H2H Generic Training East

Date of birth: 23/03/1990 (36)

Ending support from your agency
To end support for this client, select the 'Continue end support' button below.

Continue end support

Click on 'cover page' to start the end support process

The case exit function can be found at the bottom of the case plan cover page (as shown below).

homeless HOME H2H Generic Training East

Client > Case plan: cover page

Client: Case plan: cover page

Intake: 27/09/2022 Assessment: 08/11/2022 Case plan: 10/11/2022

Client
 Brown Bear
 Client number: 55711722 (Active) Date of birth: 01/01/2000 (26)
 Lead agency: H2H Generic Training East

Update the next review date
 If a date is entered and saved, a reminder will automatically appear on the case manager's home page.

Created by: Lachlan McConnochie (H2H Generic Training East)

Date created: 10/11/2022 Time created: 08:22 AM
 Client agreed: Yes Client signed: Yes
 Date of agreement: 10/11/2022

Next review date: No date specified **Update**

Case plan type: Specialist Homelessness Services sector

View plan summary **Export to PDF** **Case exit**

If you click the *case exit* button and receive a warning message advising that you have unclosed issues or services return to the case plan and close the outstanding items before you can continue.

Warning

A case exit cannot be created at this time because the following are outstanding:

Description	Open items
Unclosed issue(s)	2
Unclosed service(s)	4

Ok

Working through an end support or case exit

Once you commence an end support or case exit you need to enter information on the client's circumstances at the end of the support period (the 'end support' panels). The information required is similar to the intake, and includes the client's homelessness status, housing, income, education, personal details, and risk assessment scores. A case exit will also display a summary of the client's goal achievement throughout the case plan.

homeless² HOME L H2H Generic Training East
 Client > Case plan > case exit

Case plan: case exit

Client: Brown Bear
 Client number: 55711722 (Active) Date of birth: 01/01/2000 (26)
 Lead agency: H2H Generic Training East

Extent of goals met

Completely	Mostly	To some extent	Not at all	No longer relevant
0 of 7 (0%)	2 of 7 (29%)	2 of 7 (29%)	1 of 7 (14%)	2 of 7 (29%)

Case exit details

Date support ended: 19/05/2026
 Reason for end of support *
 What extent the goals achieved? * Mostly
 Homelessness type in last month - select all options that apply below *
 Sleeping rough or in non-conventional accommodation
 Short term or emergency accommodation, due to a lack of other options
 Not homeless
 Don't know
 Status on exit *
 Confirm details

Housing (+)
 Income (+)
 Education (+)
 Personal details (+)
 Risk assessment scores (+)

Complete case exit Cancel

The end support/case exit is divided into five sections, the first is 'open' while the remainder are 'collapsed'. To open or collapse a section click on the + or - button (as shown on the next page).

Housing (+)

Press these buttons to expand and collapse each section

End support details (-)

Date support ended: 05/12/2012

Reason for end of support *
 Reason for no case plan *
 Homelessness type in last month - select all options that apply below *
 Sleeping rough or in non-conventional accommodation
 Short term or emergency accommodation, due to a lack of other options
 Not homeless
 Don't know
 Status on exit *
 Confirm details

The *confirm* buttons on each panel will be greyed out and not available until all the mandatory fields in the section are completed.

homeless HOME H2H Generic Training East

Client > Case plan > case exit

Client

Intake

Assessment

Case plan

Cover page

Case notes

Plan summary

Behaviour

Identified strengths

Disruptive behaviour

Health & wellbeing

Problematic Alcohol ...

Problematic drug or ...

Housing/accommodatio...

Housing crisis (e.g....

Personal safety

Domestic and family ...

Case exit

Case plan: case exit

Brown Bear

Client number 55711722 (Active) **Date of birth** 01/01/2000 (26)

Lead agency H2H Generic Training East

Completing a case exit for this client

The current situation for this client has been pre-selected in the panels below. Each panel requires review and confirmation.

Extent of goals met				
Completely	Mostly	To some extent	Not at all	No longer relevant
0 of 7 (0%)	2 of 7 (29%)	2 of 7 (29%)	1 of 7 (14%)	2 of 7 (29%)

Health & wellbeing [Edit details](#)

Date support ended 19/05/2026

Reason for end of support Clients immediate needs/case management goals achieved

Extent goals were achieved Mostly

Homelessness type in last month Not homeless

Status on exit Not homeless

Housing

What is the client's address on exit? *

Don't know

Select address

Recent addresses [+ Add address](#)

Address	Housing type	Moved in	Moved out	Perm	Current
<input type="radio"/> RIVERLEA PARK SA 5120	House/townhouse/flat	22/04/2026		Yes	Yes
<input type="radio"/> GOOLWA SA 5214	Hotel/motel/bed and breakfast	02/11/2022	22/04/2026	Yes	
<input type="radio"/> Port Noarlunga Foreshore Carpark, Esplanade, PORT NOARLUNGA SA 5167	Motor vehicle	21/08/2020	01/11/2022	Yes	Yes

[Show all \(8\)](#)

Housing type

Tenure *

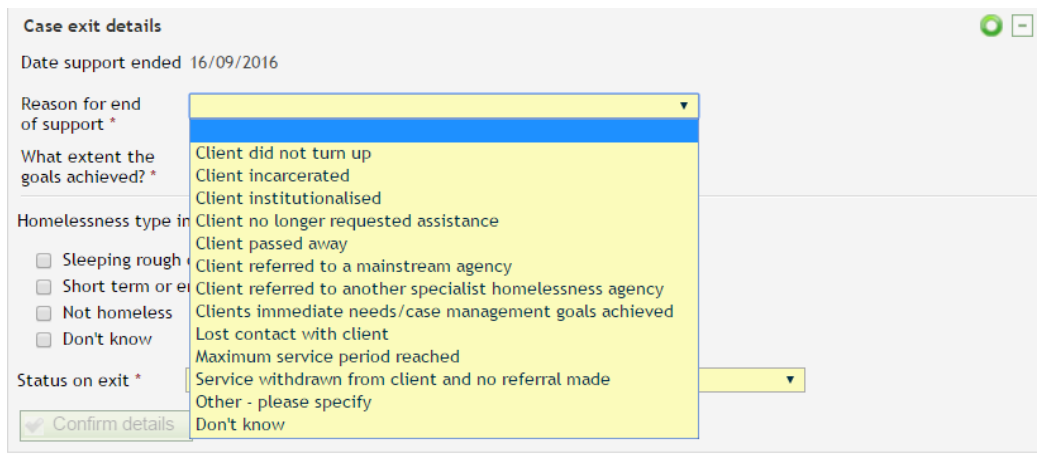
Conditions of occupancy *

Living arrangements *

The next section automatically expands when the previous section is confirmed

End support/case exit details

For both end support and case exit you will need to indicate why the support with the client is ending.



The screenshot shows a web form titled "Case exit details". At the top right, there are window control icons (a green circle, a minus sign, and a square). Below the title, the text "Date support ended 16/09/2016" is displayed. The form contains several sections:

- Reason for end of support ***: A dropdown menu is open, showing a list of reasons: "Client did not turn up", "Client incarcerated", "Client institutionalised", "Client no longer requested assistance", "Client passed away", "Client referred to a mainstream agency", "Client referred to another specialist homelessness agency", "Clients immediate needs/case management goals achieved", "Lost contact with client", "Maximum service period reached", "Service withdrawn from client and no referral made", "Other - please specify", and "Don't know".
- What extent the goals achieved? ***: A dropdown menu is open, currently showing "Don't know".
- Homelessness type in**: A section with four radio button options: "Sleeping rough", "Short term or emergency", "Not homeless", and "Don't know".
- Status on exit ***: A dropdown menu is open, currently showing "Don't know".

At the bottom left of the form, there is a button labeled "Confirm details" with a green checkmark icon.

Reasons for end support definitions	
client did not turn up	the client had a further appointment with the agency and failed to show up.
client incarcerated	the client has been placed in a facility of which the main role is to detain and rehabilitate either adult prisoners, or youth/juveniles, and as a result the client no longer requires a service, or the service can no longer be provided to the client.
client institutionalised	the client has been placed in an institution, either voluntarily or involuntarily, such as a rehabilitation facility or psychiatric ward of a hospital, and as a result, the client no longer requires a service, or the service can no longer be provided to the client.
client no longer requested assistance	the client may have decided they no longer required assistance, or they may have moved from the state/territory or regions. Do not select if the client was referred to another specialist homelessness agency.
client passed away	the client died during the period they were receiving assistance from your agency.
client referred to a mainstream agency	the client was referred to an agency other than a specialist homelessness agency and no longer requires support from your agency.
client referred to another specialist homelessness service (available for case exit only)	the client was referred to another specialist homelessness agency.
client immediate need/case management goals achieved	the client no longer requires support because their immediate needs have been met and/or case management goals have been achieved.
lost contact with client	the client may have moved on without notifying the agency. Close the support period if you have not been able to successfully contact the client.
maximum service period reached	the agency ended a support period because the maximum time period for which they can provide a service has been reached. That is, an agency may have conditions placed on their services relating to how long they can provide support to a client.
service withdrawn from client and no referral made	the agency ended the client's support period because of inappropriate behaviour or breaking agency rules. Do not select if client was referred to another specialist homelessness agency.
other – please specify	the support period ended for a reason not covered by the categories above.
don't know	the client left unexpectedly, and you have no knowledge about the reason.

Once you have selected your *reason for end support*, complete the remaining fields and confirm the panel. The housing panel will then automatically open.

The housing panel

Within the housing section, you will see a list of previous addresses for your client. You can select one of these addresses as the client's current address or add a new address.

Housing

What is the client's address on exit? *

Don't know

Select address

Recent addresses

Address	Housing type	Moved in	Moved out	Perm	Current
<input checked="" type="radio"/> RIVERLEA PARK SA 5120	House/townhouse/flat	22/04/2026		Yes	Yes
<input type="radio"/> [Address partially obscured]	Hotel/motel/bed and breakfast	02/11/2022	22/04/2026	Yes	
<input type="radio"/> Port Esplanade, PORT NOARLUNGA SA 5167	Motor vehicle	21/08/2020	01/11/2022	Yes	Yes

[Show all \(8\)](#)

Housing type: House/townhouse/flat

Tenure *: Renter - Private housing

Conditions of occupancy *: Leased tenure - nominated on lease

Living arrangements *: Lone person

You have the option to edit an address using the corresponding pencil icon providing that address has not been completed, by a moved-out date being set in the past.

Note: completed addresses (where moved in/out dates are already set) cannot be edited. If the client is returning to one of their old addresses, you will need to add it again, so that accurate time periods can be recorded for each separate stay at that location.

If the client is not exiting to their most recent current address, you will need to complete their previous current address, by adding a moved-out date, before you can add a new one.

Note: house type, tenure, and conditions of occupancy information is used to determine whether a client has had a successful housing outcome at exit. Entering an 'other;' or 'don't know' response into any of these fields may result in the housing outcome for you client being recorded as an unknown.

The income panel


The income panel will automatically be pre-filled with income details that have been previously added to the client (either in the intake, or during the support period). In this panel you can update the existing information by clicking the edit pencil, or clicking the *add income* button if no income information exists.

Complete the remaining fields and click the *confirm income* button. This will change the panel to view mode, and open the education panel.


Income

Does the client have a source of income? *

Don't know
 No
 Yes - select income source

Income details on exit		Total Income
Main source	Other sources	
<input checked="" type="radio"/> Employee income		\$5000.00 fortnightly 

Is the client registered for a government payment but awaiting their first payment? *

Don't know
 No
 Yes - date registered  dd/mm/yyyy

What is the client's labour force status? *

Don't know
 Not in the labour force
 Unemployed
 Employed

What is the client's employment type? *

Don't know
 Part-time
 Full-time

The education panel

This contains the same education questions as the intake. As with the other panels, if details already exist on the client record, they will appear here.

If no details currently exist and you select 'yes' on the question 'Is the client undertaking formal education or training' you will be required to enter education details by pressing the *Add education* button, completing the details in the pop-up box and pressing *save*. You will need to answer the questions: education type and enrolment status.

Education

Is the client currently undertaking formal education or training? *

Don't know

No

Yes - select main education or training type

Education details on exit

+ Add education

No details currently exist for this client

Confirm education

The personal details panel

Use this section to record any updated contact email address or phone numbers for the client. If the client is under 18 you will have care and protection details shown. Check to see if these details are current and make an necessary changes.

Personal details

Phone # Mobile #

Email Address

Confirm personal details

The risk assessment scores panel

Here you can update at Risk scores already recorded and add or edit a text description of the assessment tool used (if relevant), to capture if a client's risk has reduced since the score was last recorded.

Risk assessment scores

Risk assessment type	Score	Assessment Tool
Homelessness	14	AHVTT
Domestic Violence	62	Family Safety Framework

Confirm risk score

Where a client has an identified issue of Domestic/Family Violence, but does not have a score recorded, you will need to either add the risk score or record the reason a risk assessment has not been completed.



Risk assessment scores

Risk assessment scores







No details currently exist for this client

+ Add score

Confirm risk score

Finalising the end support or case exit

After each panel is confirmed (green ticks in the top corner of each panel) the *complete* button will be available. If this button is greyed out, one or more panels are not yet complete. In this case, review the page to check that all panels have been completed.

Case exit details		Edit details 
Date support ended	20/05/2026	
Reason for end of support	Clients immediate needs/case management goals achieved	
Extent goals were achieved	Mostly	
Homelessness type in last month	Not homeless	
Status on exit	Not homeless	
Housing		Edit housing 
Address	RIVERLEA PARK SA 5120	
Permanent	Yes	
Housing type	House/townhouse/flat	
Tenure	Renter - Private housing	
Conditions of occupancy	Leased tenure - nominated on lease	
Living arrangements	Lone person	
Income		Edit income 
Source of income	Yes	
Main source	Employee income	
Other sources		
Total income	\$5000.00 fortnightly	
Registered/awaiting government payment	No	
Labour force status	Employed	
Employment type	Part-time	
Education		Edit education 
Formal education /training	No	
Education type	Not applicable	
Enrolment status	Not applicable	
Personal details		Edit personal details 
Phone #	Mobile #	45466565656656
Email Address	Brown.bear@Jellystone.gov.au	
Risk assessment scores		Risk assessment scores 
Homelessness	17 - AHVTT	
Domestic Violence	0	
<input type="button" value="Complete case exit"/> <input type="button" value="Cancel"/>		

Clicking the *Complete case exit* button shows a summary of the end support/case exit information (as shown below). The end support/case exit is no longer editable.

Created by	Lachlan McConnochie (H2H Generic Training East)	
Case exit details		
Date support ended	20/05/2026	
Reason for end of support	Clients immediate needs/case management goals achieved	
Extent goals were achieved	Mostly	
Homelessness type in last month	Not homeless	
Status on exit	Not homeless	
Housing		
Address	RIVERLEA PARK SA 5120	
Housing type	House/townhouse/flat	
Tenure	Renter - Private housing	
Conditions of occupancy	Leased tenure - nominated on lease	
Living arrangements	Lone person	
Income		
Source of income	Yes	
Main source	Employee income	
Awaiting government payment	No	
Labour force status	Employed	
Employment type	Part-time	
Education		
Formal education /training	No	
Education type	Not applicable	
Enrolment status	Not applicable	
Risk assessment scores		
Homelessness	17	AHVT
Domestic Violence	0	

Post case follow ups

After completing the Case exit, the client status remains *active* to allow for post case reminder follow-ups. (If you have completed an end support, your client status will have immediately changed to inactive).

At 3- and 6-months post exit, you can follow up with the client, using the post case reminder fields to enter any provided information.

To update, select the button as indicated below;

The screenshot shows the 'Case plan: cover page' for a client named 'Brown Bear'. The client number is 55711722 (Active) and the date of birth is 01/01/2000 (26). The lead agency is H2H Generic Training East. The case plan was created by Lachlan McConnochie on 10/11/2022 at 08:22 AM. The client agreed to the plan on 10/11/2022. The next review date is 'No date specified'. The case plan type is 'Specialist Homelessness Services sector'. The post case info section shows followup dates of 20/08/2026 and 20/11/2026. At the bottom, there are three buttons: 'View plan summary', 'Update post case reminder' (circled in red), and 'Export to PDF'. There is also a 'Close case plan' button.

Then complete the pop up that appears, and save.

The 'Post case info' pop-up form has a title bar 'Post case info'. It contains two rows of date input fields. The first row is for 'Followup date 1' with the value '20/08/2026' and a dropdown menu. The second row is for 'Followup date 2' with the value '20/11/2026' and a dropdown menu. At the bottom left is a 'Save' button and at the bottom right is a 'Cancel' button.

Post case reminders are not mandatory. You are not required to add dates to close the case plan.

Closing your case plan

After completing an 'End support' the client status immediately becomes 'Inactive'.

Closing a client after a 'Case Exit' is a two-step process.

After completing the Case exit (as explained above) the client status remains *Active* to allow for post case reminder follow-ups. To close the client record (make the client *inactive*) press the *Close case plan* button on the case plan cover page (as shown below) the client status will change to 'Inactive'. The client record has now been closed.

homeless HOME Training H2H Generic Training East

Client > Case plan: cover page

Client: Brown Bear

Intake: 27/09/2022 | Assessment: 08/11/2022 | Case plan: 10/11/2022

Client number: 55711722 (Active) | Date of birth: 01/01/2000 (26)

Lead agency: H2H Generic Training East

Created by: Lachlan McConnochie (H2H Generic Training East)

Date created: 10/11/2022 | Time created: 08:22 AM

Client agreed: Yes | Client signed: Yes

Date of agreement: 10/11/2022

Next review date: No date specified

Case plan type: Specialist Homelessness Services sector

Post case info

Followup date 1: 20/08/2026

Followup date 2: 20/11/2026

Buttons: View plan summary, Update post case reminder, Export to PDF, **Close case plan**

homeless HOME Training H2H Generic Training East

Client > Client summary

Client: Brown Bear

Client number: 55711722 (Inactive) | Date of birth: 01/01/2000 (26)

Lead agency: H2H Generic Training East

Alerts: There are no active alerts for this client.

Client is not currently part (member or head) of a presenting unit.

homeless²HOME

AGENCY MANAGER FUNCTIONS

About the agency manager role



Agency Manager is the highest level of access to the H2H system. The agency manager role is responsible for monitoring activity, accepting and rejecting referrals, assigning clients to workers, setting records as locked/sensitive/deceased and downloading reports.

It is up to the individual agency to determine which staff will be allocated the agency manager user level. Some agencies elect to assign this role to multiple staff, and others nominate the role to those in leadership positions.

Note: *it is recommended that there be at least two users with agency manager level of access to ensure that referrals can be actioned in a timely manner in the event of staff absence due to leave or illness.*

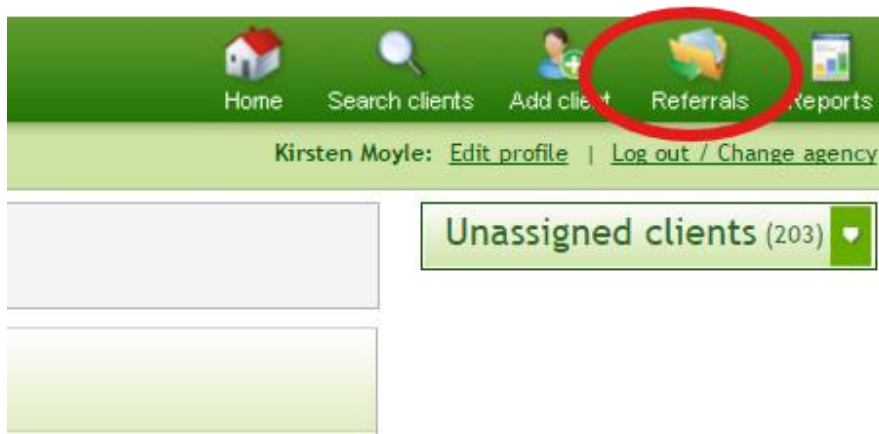
Reminders and the inbox

For Agency Managers, reminders and inbox notifications will appear for all clients, rather than only clients that are specifically assigned to the individual worker. This allows managers to monitor activity across the agency and follow up with workers on expiring consents, pending referrals and clients without activity.

 Reminders
No reminders available
 Inbox
Pending client referrals (0)
Pending service referrals (0)
Pending consented services (0)
In progress intakes (0)
Pending unmet needs (1)
In progress assessments (0)
Pending case plan reviews (0)
Pending post case reminders (0)
Consent for information sharing expiring (0)
Clients without activity (0)

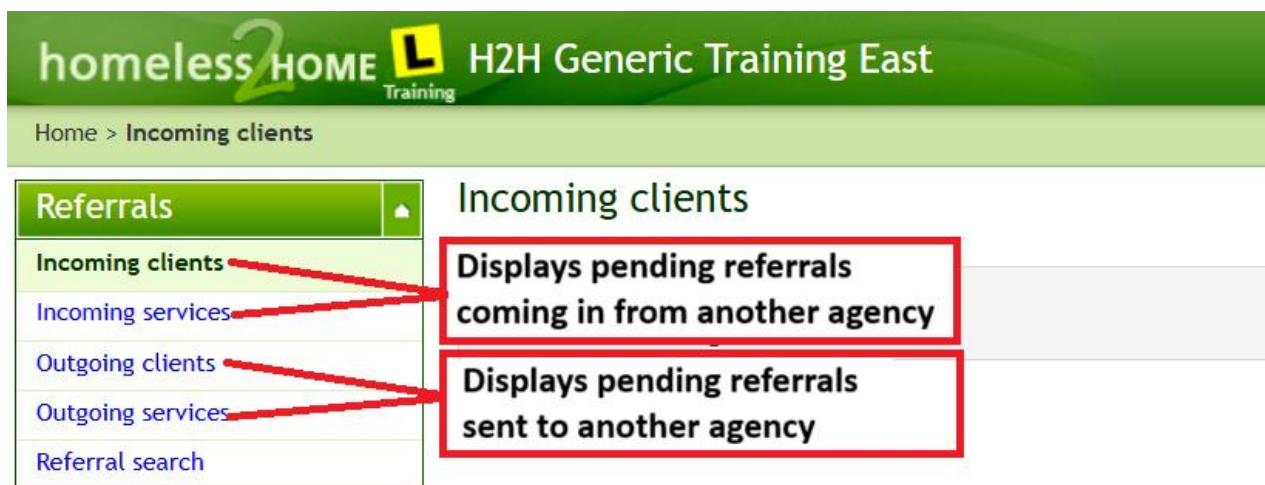
Referrals menu

Agency Managers have access to two unique menus not available to other access levels. The first is the referrals menu.



Agency managers are responsible for monitoring incoming and outgoing referrals (both client and service), to ensure they are actioned in a timely manner.

All agencies also have a designated referrals email address and will receive a notification when a referral is received, and when referrals are actioned. These referrals can be found in the menus as shown below;



Client referrals

To action a client referral, open by clicking within the text box as shown below;



homeless2HOME Training H2H Generic Training East

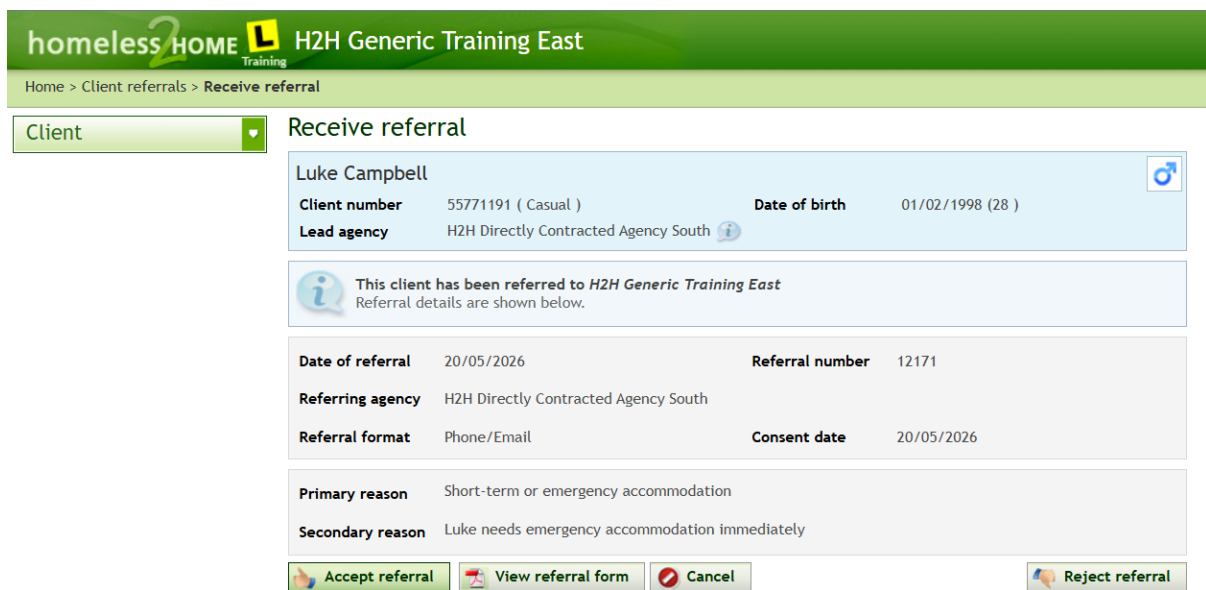
Home > Incoming clients

Referrals

- Incoming clients
- Incoming services
- Outgoing clients
- Outgoing services
- Referral search

Referral	Client	Reason	From
20/05/2026 12171 INT	Campbell, Luke 55771191	Short-term or emergency accommodation (Luke needs emergency accommodation immediately)	H2H Directly Contracted Agency South Manager Manager

The receive referral page will appear;




homeless2HOME Training H2H Generic Training East


Home > Client referrals > Receive referral


Client

Receive referral

Luke Campbell 

Client number 55771191 (Casual) **Date of birth** 01/02/1998 (28)

Lead agency H2H Directly Contracted Agency South 

 This client has been referred to H2H Generic Training East
Referral details are shown below.




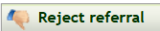
Date of referral 20/05/2026 **Referral number** 12171

Referring agency H2H Directly Contracted Agency South

Referral format Phone/Email **Consent date** 20/05/2026

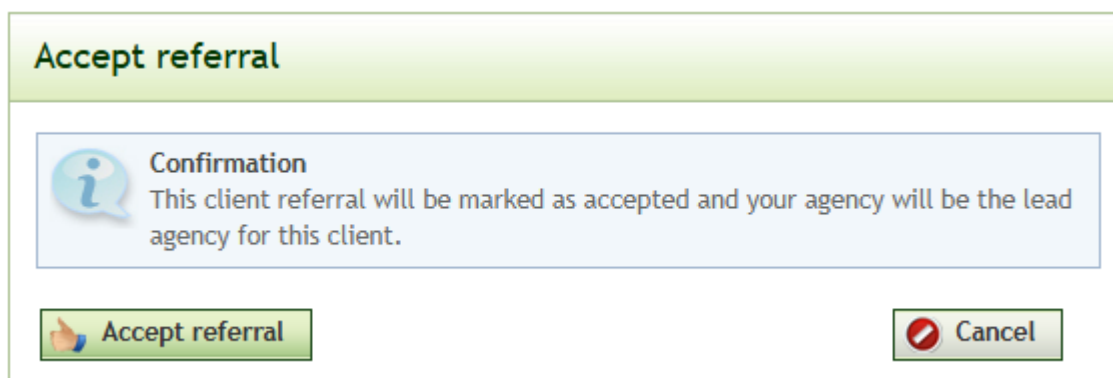
Primary reason Short-term or emergency accommodation

Secondary reason Luke needs emergency accommodation immediately


   



On this page you can either accept or reject the referral and view the pdf referral form if required.

To accept, select the *Accept referral* button, on this screen, and then again on the pop up that appears to confirm;



Accept referral

 **Confirmation**
This client referral will be marked as accepted and your agency will be the lead agency for this client.

On acceptance of the referral you will be re-directed to the personal details page.

To reject the client referral, select the *Reject referral* button, then complete the reason for rejection in the pop up that appears;

Reject referral

To reject a referral, select a 'Reason for rejection'. Extra notes can be typed into the 'Additional information' field.

Reason for rejection *

Additional information

Reject referral Cancel

After rejecting a referral you will be returned to the incoming clients screen, and the referral will have disappeared from the list.

Service referrals and consented services

Incoming service referrals are also accepted through the referral's menu. To action, go to the incoming services screen;

Referral	Client	Type	Reason	From	Case manager	Category
20/09/2016 17662 INT	Anderson, Bec (Beca) 55661133	Intake	Bec presented seeking assistance with a food voucher	Outer Southern Generic Homelessness Service Janine Moule DCSIHousingH2H@sa.gov.au	Kirsten Moyle	Consented Service
20/09/2016 17661 EXT	Lovegrove, Emily 55691185	Intake	Emily to attend parenting group	Outer Southern Generic Homelessness Service Janine Moule DCSIHousingH2H@sa.gov.au	No case manager assigned	Service Referral

This screen will list the following types of services;

- Services referred by another lead agency
- Consented services provided to your client by another agency with consent
- The type column will indicate whether the referral is an intake service or case plan service
- The category column will indicate whether it is a service referral or a consented service

To accept or reject a service referral, click on the text in the list to open, and then select the appropriate button to either accept or reject. When accepting a service referral, you will need to identify the appropriate service element, and assign a caseworker;

Accept referral


Confirmation
This service referral will be marked as accepted by your agency.

Service element * In centre support - GEN - Specialist counselling services

Allocate case worker * Lachlan McConnochie

Accept referral **Cancel**

To finalise a service that has been provided to your client by another agency (a consented service), open the consented service from the list;

homeless HOME  H2H Generic Training East
 Home > Incoming services


Referrals

- Incoming clients
- Incoming services**
- Outgoing clients
- Outgoing services
- Referral search


Incoming services


Referral	Client	Type	Reason	From	Case manager	Category
28/04/2026 17864 INT	Bear, Brown 55711722	CasePlan	another consented service	H2H Directly Contracted Agency South Manager Manager housingH2H@sa.gov.au	No case manager assigned	Consented Service
23/04/2026 17860 INT	Garcia, Roberto 55660037	CasePlan	adsfhdfghdfghdfgh	Inner and Outer Northern Generic Homelessness Service Duty Worker housingh2h@sa.gov.au	Lachlan McConnochie	Consented Service

This will open the 'receive consented service' page; where the notification can either be accepted or rejected.

Brown Bear 

Client number 55711722 (Inactive) **Date of birth** 01/01/2000 (26)

Lead agency H2H Generic Training East 

 **This client has been provided a service by a consented agency**
Please review the details and accept or reject this consented service notification.

Date of notification 28/04/2026 **Number** 17864

Provided agency H2H Directly Contracted Agency South **Requesting case worker** No case manager assigned

Request format Email only **Date consent granted** 28/04/2026


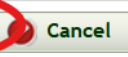

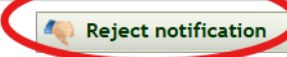
Contact person Lachlan McConnochie **Response type** Case Plan

Service type Case plan

Provided service GEN - Employment assistance

Service description testing the notes function

Reason for notification another consented service

You can also review outgoing client or service referrals through the referral's menu.

The outgoing clients screen will display all clients that have been referred to another agency but are still pending.


The outgoing services screen will display the following types of services;

- Services referred to another non-lead agency awaiting action
- Consented services provided to another agency's client awaiting action
- The type column will indicate whether the referral is an intake service or case plan service
- The category column will indicate whether it is a service referral or a consented service

- Referrals
- Incoming clients
- Incoming services
- Outgoing clients
- Outgoing services
- Referral search

Outgoing services

Referral	Client	Type	Reason	To	Case manager	Category
20/05/2026 17891 EXT	Brown, Jamie 55770736	CasePlan	duty worker	H2H Directly Contracted Agency South Manager Manager housingH2H@sa.gov.au	Lachlan McConnochie	Service Referral
18/05/2026 17890 EXT	Brown, Jamie 55770736	CasePlan	assistance to client to maintain connections to mob	Kurlana Tampawardli Duty Worker h2h@sa.gov.au	Lachlan McConnochie	Service Referral
04/05/2026 17882 EXT	Andrew, Thomas (Tom) 55767675	Intake	Reason for referral goes here	Kurlana Tampawardli Duty Worker h2h@sa.gov.au	No case manager assigned	Service Referral
19/06/2024 17501 EXT	Abbott, Tony 55767491	CasePlan	ddfgsdfg	ANWHA Access Duty Worker housingh2h@sa.gov.au	Kirsten Moyle	Service Referral

If required, any outgoing client or service referrals can be withdrawn by opening the referral from the list and selecting the  button.

Referral search

Agency managers are also able to search for a specific referral in the referral's menu;

- Referrals
- Incoming clients
- Incoming services
- Outgoing clients
- Outgoing services
- Referral search

Referral search

Type Direction

Status Period -

Referrals can be searched by any combination of;

- Type – client or service
- Direction – incoming or outgoing
- Status – pending, accepted, rejected, withdrawn
- Time period

To use the search function, enter the selected criteria, and select search. Any matching referrals will be displayed; Click on each referral to view further details.

homeless² HOME Training Eastern Adelaide Generic Homelessness Service

Home > Referral search

- Referrals
- Incoming clients
- Incoming services
- Outgoing clients
- Outgoing services
- Referral search

Referral search

Type Direction

Status Period -

Results: 1-2 of 2

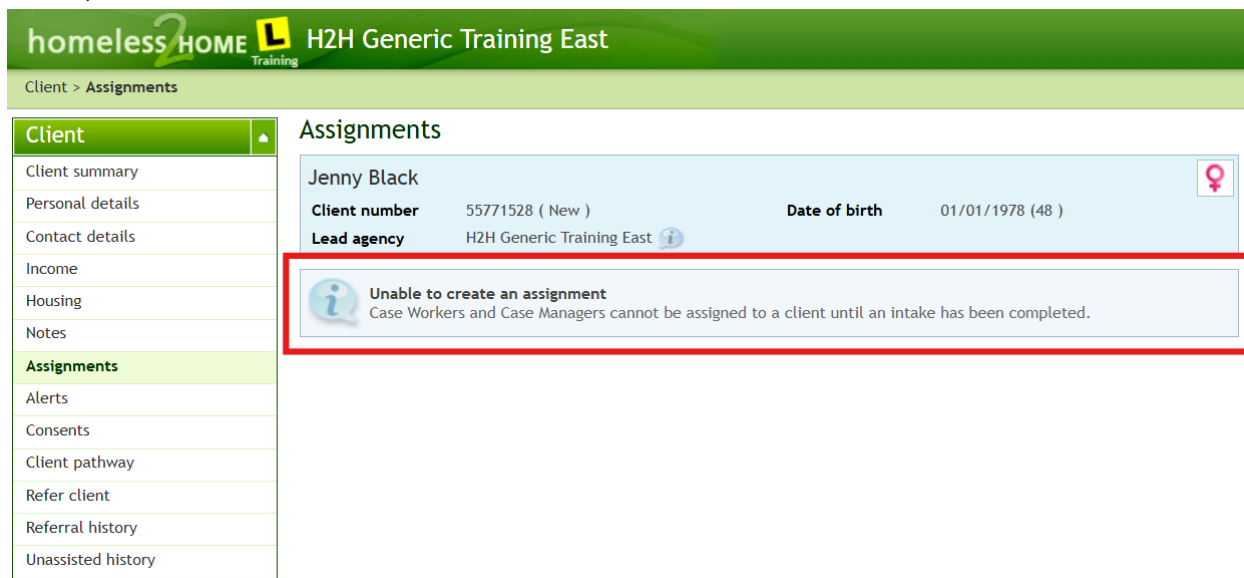
Type	Referral	Client	Reason	To/From	Status
Service Case plan Incoming	15/02/2019 183895 Internal (NAHA)	Estabrooks, Brooke 56679786	counselling for DV	From : Coolock House Kirsten Moyle DHS HousingH2H@sa.gov.au	Rejected
Service Case plan Outgoing	15/02/2019 183894 NAHA	Estabrooks, Brooke 56679786	Parenting program	To : Coolock House Duty Worker DHS HousingH2H@sa.gov.au	Accepted

« Previous | Page: 1 | Next »

Assignments

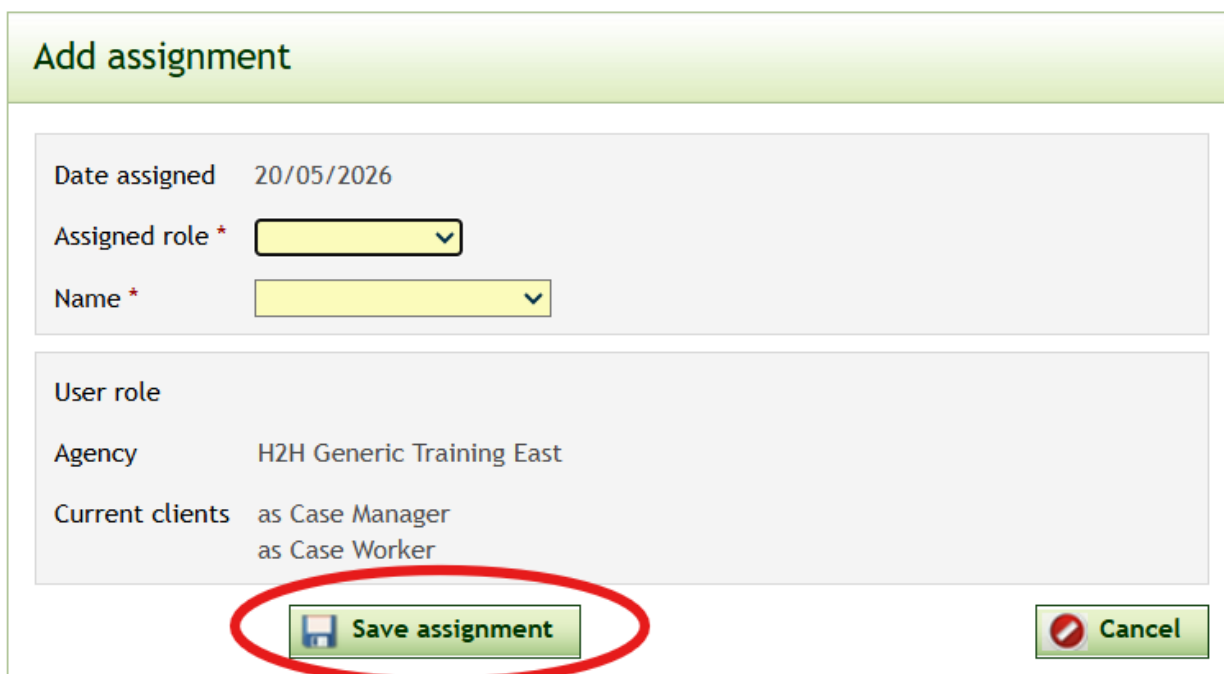
In order to complete some actions on a client record, a worker must be assigned to a client as either a caseworker or case manager (depending on the user's access level to the system). The responsibility for assignments sits with the agency manager role.

In order to assign a worker to a client, the client must first have had an intake completed. If an intake has not yet been completed, you will see a warning when trying to open the assignments screen;



The screenshot shows the 'homeless HOME L H2H Generic Training East' interface. The breadcrumb is 'Client > Assignments'. On the left is a 'Client' menu with options like 'Client summary', 'Personal details', 'Contact details', 'Income', 'Housing', 'Notes', 'Assignments', 'Alerts', 'Consents', 'Client pathway', 'Refer client', 'Referral history', and 'Unassisted history'. The main area is titled 'Assignments' and shows client details for 'Jenny Black': 'Client number 55771528 (New)', 'Date of birth 01/01/1978 (48)', and 'Lead agency H2H Generic Training East'. A red box highlights a warning message: 'Unable to create an assignment. Case Workers and Case Managers cannot be assigned to a client until an intake has been completed.'

Once the client has reached at least a status of 'casual', you will be able to assign them to a worker. To assign a case manager or case worker, click on the *assignments* page within the *client* menu and then click the *add assignment* button. The following pop-up box then appears;



The 'Add assignment' form has a title bar 'Add assignment'. It contains the following fields: 'Date assigned' with value '20/05/2026'; 'Assigned role *' with a dropdown menu; 'Name *' with a dropdown menu. Below these is a 'User role' section with 'Agency' set to 'H2H Generic Training East' and 'Current clients' with options 'as Case Manager' and 'as Case Worker'. At the bottom, there are two buttons: 'Save assignment' (circled in red) and 'Cancel'.

Complete the relevant fields to assign a worker and click the *Save assignment* button.

Any currently assigned workers will be listed on the assignments page; and can be edited if required by using the pencil icon as shown below;

homeless HOME Training H2H Generic Training East

Client > Assignments

Client

- Client summary
- Personal details
- Contact details
- Income
- Housing
- Risk assessment scores
- Notes
- Assignments**
- Alerts

Assignments

Thomas Andrew (Tom)

Client number 55767675 (Casual) **Date of birth** 01/01/1990 (36)

Lead agency H2H Generic Training East

Assignments

Assigned role	Staff member	Services	Agency	Date assigned	Assigned by	Action(s)
Case worker	Lachlan McConnochie	3	H2H Generic Training East	04/05/2026	Intake Service	

Add assignment

Note: a worker cannot be both a case worker and a case manager at the same time. If a worker is already assigned as a case worker, and you wish to make them a case manager, select the edit pencil and change their assigned role in the pop up that appears.

Assignment rules summary	
Case workers	A case worker can be assigned either by an agency manager, or automatically by the system through adding an intake service to the client record or by being assigned a service referred from other agencies during the referral acceptance process. As many case workers as needed can be assigned to the client.
Case managers	Only one case manager can be assigned at a time. The case manager must be assigned directly by an agency manager. A client must have a case manager assigned before a case plan can be opened.
Agency managers	Agency managers can add services or make changes to a client's case plan without being assigned as a case worker or case manager.

Search by worker

Agency managers can search client records by the assigned worker;

Search clients

The screenshot shows a search form with the following fields: Client number, Surname, Alias/nickname, Sex (dropdown), My agency only (checkbox), First names, Date of birth (dd/mm/yyyy), Status (dropdown set to 'New'), and Assigned worker (dropdown). The 'Assigned worker' dropdown is circled in red. Below the form are 'Search', 'Clear', and 'Add client' buttons.

Agency managers can select a worker's name from the list and select the search button to display all clients who are assigned to that worker, whether as case worker, case manager, and as either a lead or consented agency.

Additional search fields can also be completed if you wish to narrow the results down further, e.g. selecting a status of 'Active' combined with an assigned worker's name, will display all clients in case plan assigned to that worker;

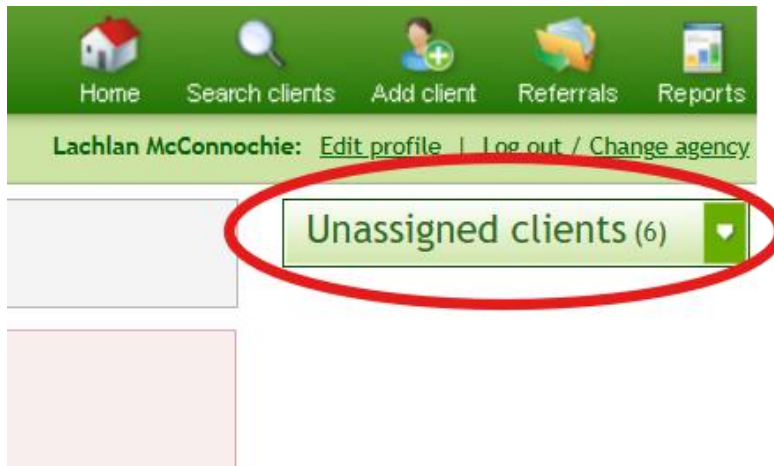
Search clients

The screenshot shows the search form with the 'Assigned worker' dropdown and 'Add client' button circled in red. Below the form is a table of search results. The table has columns for Name, DOB, Status, Client pathway, and First/last contact. The results show 13 clients, with the first six listed.

Name	DOB	Status	Client pathway	First /last contact
Baudin, Nicolas 55771870	M 20/06/1975	New		08/05/2026 08/05/2026
Black, Jenny 55771528	F 01/01/1978	New		10/02/2026 10/02/2026
Bridgewater, Zoey 55771801	F 26/11/2024	New		16/04/2026 16/04/2026
Brown, April 55769563	F 09/03/1987	New		22/07/2024 22/07/2024
Jones, Barry 55756877	M 2005	New		17/08/2022 17/08/2022
Mckenzie, Jenny 55769167	F 12/08/1989	New		02/04/2024 02/04/2024

Unassigned clients list

On the home page, agency managers will find the Unassigned clients list;



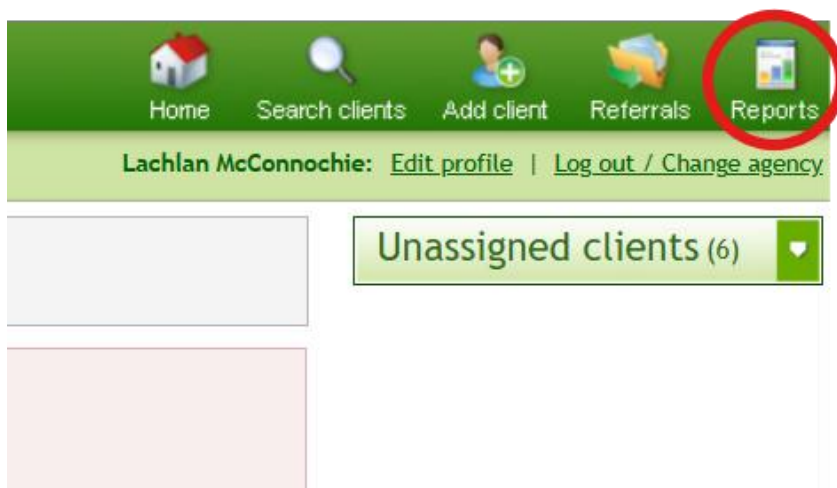
This list will display in alphabetical order, by surname, any client record with a status of new, casual, or assessed, that has not been assigned to a case manager.

Clients who have had a case worker assigned will still appear in the unassigned clients list.


To remove a client from the unassigned client list they must either be assigned a case manager, or either an end support or unassisted completed.

Reports


The operational reports function in H2H allows agency managers to download six types of pdf reports



Operational reporting

 Information available to generate reports is current as of 12/12/2018 at 07:40 AM
Changes made after this time will not yet be reflected in these reports.

Name *

 **Generate report**

- Active Users
- Client no activity
- Client status and demographic
- Case plans
- Work load
- Assigned/unassigned

These are for the majority 'point in time' only, which means they will not return historical information, only information 'as of today'. You cannot add multiple reports together to get a total for a certain period, as the reports can change daily to reflect the current client group.

Read on below for information about the different types of reports;

H2H operational reports	
Active Users	Provides a list of all users currently assigned to the agency, this can include users of other agencies that have consented services assigned to a client of this agency
Client no activity	Displays clients who have had no activity in the current month (completion of an intake, assessment, case plan, or addition of a service are all considered 'activity').
Client status and demographic	Point in time report of all clients where your agency is the current or last lead agency. Includes client status, First Nations/non-First Nations, sex, age range. Displays all clients.
Case Plans	Number of case plans that were open/closed during a selected date range
Work load	Point in time report displaying worker workload summary including summaries for case managers, case workers, and consented clients, broken down by open and closed services.
Assigned/unassigned	This report is not currently available

Sensitive and locked

The sensitive and locked functions can be used to restrict the ability to view client records where there is a risk to client safety. These functions can only be accessed by users with agency manager access.

Workers should only add sensitive or locked status to a client in exceptional circumstances, where there is real likelihood that the client is at risk of harm if someone **with access to H2H** could view their information, or if there are pressing confidentiality concerns.

For example;

- a client presenting to a domestic violence service identifies that the perpetrator is employed by another SHS
- a worker of an SHS has been homeless or experienced domestic violence in their past, and does not want their colleagues to be able to view their support history
- a worker of an SHS is currently seeking assistance from another SHS and does not want their colleagues to be aware of their situation

The locked and sensitive functions can be found at the top of the *add client* or *personal details* page within the client menu when in edit mode.

The screenshot shows the 'Add client: client details' form in edit mode. At the top left, there is a green header with the 'homeless HOME Training' logo and 'H2H Generic Training East'. Below the header, the breadcrumb 'Client > Add client: client details' is visible. The form itself has a light green background. On the left, there is a button labeled 'Add client'. The main form area contains several fields: 'Client number' (empty), 'Date of first contact *' (20/05/2026), and two dropdown menus: 'Sensitive' (set to 'No') and 'Lock client' (set to 'No'). Both dropdown menus are circled in red in the image.

Sensitive and locked definitions

Sensitive	Setting a client's record to <i>sensitive</i> means that only workers within the clients lead or consented agencies will be able to find the record in a H2H search.
Locked	Setting a client's record to <i>locked</i> means that only agency managers and workers directly assigned to the client will have access to the record (either as lead or consented agency). Locking a client record even restricts your work colleagues from finding the client in H2H, and should therefore only be used in exceptional circumstances.

Note: a client should be set as either locked OR sensitive, not both. The locked function over-rides the sensitive function, so there is no purpose in setting a client to both.

Set deceased

If a client has passed away, you will need to set the record to deceased. This function is only available to users with agency manager access.

To set a client as deceased, go to the personal details screen within the client menu;


Client	Personal details
Client summary	Thomas Andrew (Tom)
Personal details	Client number 55767675 (Casual) Date of birth 01/01/1990 (36)
Contact details	Lead agency H2H Generic Training East ⓘ
Income	Date of first contact 07/03/2023 Marital status
Housing	Other sex specified does not identify as either
Risk assessment scores	Cultural identity
Notes	Aboriginal No
Assignments	Torres Strait Islander No
Alerts	Language other than English spoken at home Yes
Consents	Other language Italian Interpreter required <input type="checkbox"/>
Client pathway	Spoken english proficiency Well
Refer client	Does not read English <input type="checkbox"/> Does not write English <input type="checkbox"/> Needs help completing forms <input type="checkbox"/>
Referral history	Country of birth Italy Year of first arrival 2008
Unassisted history	Residency status Citizen
Intake	External agency details
Assessment	
Case plan	
End support	

Scroll to the bottom of the screen and select the  button.

Note: all client deaths need to be reported to your SA Government contract manager. Please contact your contract manager to determine what reporting may be required BEFORE setting the client record as deceased.

Once in edit mode, you will find the  button at the bottom of your screen.

Depending on the status of the client you may receive an alert when attempting to set deceased;


 Alert				
This client cannot be set to deceased until the activities listed below are completed:				
<table border="1"><tr><td>Activity</td></tr><tr><td>Client assignment</td></tr><tr><td>Presenting unit</td></tr><tr><td>End support</td></tr></table>	Activity	Client assignment	Presenting unit	End support
Activity				
Client assignment				
Presenting unit				
End support				
Ok				

In order to set a client as deceased the record must be inactive, so you may need to complete an [end support or case exit](#). When you complete the 'reason for end support' ensure you select the reason 'client passed away'.

Note: once the record has been set deceased it will no longer be visible on H2H. If you wish to print a copy of the case plan or any notes you will need to do this **BEFORE** setting the client record to deceased.

Once the client record is inactive, and you have printed any required documents, you will then be able to set the record to deceased, by selecting the set deceased button and then completing the pop up that appears;

Set as deceased

 **This action is irreversible**
You will no longer be able to access a client that is set as deceased.
A closing client note is required.

Contact type *

Closing client note *

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DEFINITIONS AND GLOSSARY OF TERMS

Service definitions

Definitions of each specific service can be found in detail in the AIHW - SHS collection manual accessible on the H2H support page.

Service element definitions

Service elements are used to determine what part of your program the client is being supported by. The list of service elements that are available for each agency is unique and dependent upon which programs your agency is funded to provide, and whether your agency operates as part of an Alliance. If you are unsure which service element to choose for the clients' circumstance, speak to your team leader or manager.

You can find definitions for your agency service elements in the two charts below;

Service element definitions – alliance agencies	
Accommodation	Accommodation provided directly by your agency, for example, on-site crisis or transitional accommodation. This is used to collect data of actual nights of accommodation that have been provided to a client. Accommodation that has been paid for by an agency using brokerage (i.e. an agency paying for a night's motel accommodation for a client) would be recorded using the 'Accommodation – Brokerage'.
Accommodation - Brokerage	Where an Agency has paid for accommodation for a client using their brokerage funding (i.e. an agency paying for a night's motel accommodation for a client), where other funding sources were not available (e.g. SA Housing Trust)
Adolescent brokerage	Provision of case management and brokerage support to young people (16-20) who are unable to access mainstream or other funding sources because they do not meet the required eligibility criteria.
Brokerage	Brokerage funds are allocated to purchase specialist services required by clients, or to overcome geographical restrictions to service provision. Brokerage funds are allocated for meeting crisis needs and implementing case plan goals.
Boarding house support	Support provided to clients residing in Boarding Houses in the metropolitan area to help them sustain their accommodation and/or access other more suitable forms of housing.
Early intervention/prevention	Initiatives which work to ensure people don't experience homelessness, or domestic and family violence. Early intervention works to reduce the risk factors and increase the protective factors associated with people experiencing homelessness, or domestic and family violence.
General assistance and support	A wide range of support provided by an agency worker that is not a specialised service. That is, the support is provided without the expectation that the worker has completed formal, specialised training in that area of assistance. General assistance may cover a range of assistance from financial assistance/information, employment/training assistance, to assistance for domestic/family violence and family/relationship assistance.























Rough sleeper response	Provision of support for people who are rough sleeping to transition into safe, stable and sustainable housing. Includes case management support to access housing and manage their health care needs.
Motel support	Services provided to clients placed in motel accommodation due to a lack of alternative crisis accommodation options.
DV – Perpetrator response	Targeted responses and interventions for individuals who have perpetrated domestic and/or family violence
Return to country	Outreach support and appropriate financial assistance to support Aboriginal people experiencing, or at risk of experiencing homelessness, to return to their home communities
Risk assessment	A structured and systematic approach for understanding and assessing risk which is linked to safety planning for people experiencing or at risk of experiencing domestic and family violence
Safe at home	Interventions, strategies, or programs that aim to support women and their children experiencing domestic and or/family violence to remain safely in their home or home of their choice, community, or community of their choice where it is safe to do so
DV – Safe transport	Safe transport supports people escaping domestic and/or family violence. It includes working in partnership with relevant agencies and facilitating an assisted referral process to enable a safe and connected transition for the client to appropriate services at their destination
Safety planning	The process of supporting a client to identify what can be put in place to help protect themselves and their children and make them feel safer. It must be relevant to a client’s needs. Adapted if their situation changes and be provided in a safe and supportive environment using trauma-informed and strength-based approaches.
Specialised services	Assistance that can be provided only by a person with formal, specialised training in that area of assistance. Specialised services may range from psychological/psychiatric services to professional legal services. Specialised services may be provided by agency workers or may require an agency worker to assist the client in receiving external services. This does not include assistance for family and domestic violence.
Supportive housing packages	A funded package of support and case management to eligible vulnerable people with complex needs, to support them to live independently, and secure and maintain a tenancy. SA Housing Trust and Community Housing Providers (CHPs) provide and manage the properties and tenancies.

Service element definitions – directly contracted service providers	
Accommodation	Accommodation provided directly by your agency, for example, on-site crisis or transitional accommodation. This is used to collect data of actual nights of accommodation that have been provided to a client. Accommodation that has been paid for by an agency using brokerage (i.e. an agency paying for a night's motel accommodation for a client) would be recorded using 'Accommodation – Brokerage'.
Accommodation - Brokerage	Where an Agency has paid for accommodation for a client using their brokerage funding (i.e. an agency paying for a night's motel accommodation for a client), where other funding sources were not available (e.g. SA Housing Trust)
Assertive outreach	<p>Aims to provide pathways out of homelessness by delivering a housing first response as an effective response to ending rough sleeping. To be used only by agencies who have a specific assertive outreach component included within their service agreement.</p> <ul style="list-style-type: none"> • Reduce the incidence of people sleeping rough by providing support to access appropriate accommodation and specialist case management support • Establish an effective intake system for people sleeping rough, with appropriate risk and assessment tools to determine and record client needs • Acknowledge and target individuals immediate and longer-term needs • Provide a multi-disciplinary team approach to outreach work and case management practice, <p>Engage clients in the development of exit-oriented plans that enable them to attain the necessary independent living skills and move into long term housing with outreach support where required.</p>
Brokerage	Brokerage funds are allocated to purchase specialist services required by clients, or to overcome geographical restrictions to service provision. Brokerage funds are allocated for meeting crisis needs and implementing case plan goals.
Counselling (general counselling, DV and AFV specific, family mediation and therapy, sexual abuse specific)	Services provided to clients for counselling from an agency funded to provide counselling assistance. This may be specific to Domestic Violence, Aboriginal and family violence counselling, family mediation and or therapy, youth or sexual abuse specific or non-specific counselling.
Risk assessment	Services provided to the client throughout the process of completing a Domestic Violence Risk Assessment
Early intervention/prevention	Services to assist clients at risk of becoming homeless. Early intervention also covers situations where the client owns the home or is living rent free with family or partner and is experiencing domestic violence or abuse, or at risk of defaulting on mortgage repayments, or

	experiencing family breakdown, or where client is transitioning from custodial or care arrangements.
Early intervention outreach	Services provided to support women and their children on an outreach basis in identified community settings (e.g. courts) before they are able or willing to engage fully with agencies.
Gateway for service	A client has presented to your agency and is either not eligible or would be better placed with another agency and is subsequently referred. E.g. If a client under the age of 16 presents to your agency where the target group is adults, you would 'Add Client' and do an Intake on H2H, then refer the client to a more appropriate agency.
In centre support	Support provided at the agencies premises and defined as: <ul style="list-style-type: none"> • One on one contact with a client • Group setting – e.g. if an agency runs a course (i.e. parenting course) and several different clients attend this course
In home accommodation support	Specific to Adelaide Common Ground to record: <ul style="list-style-type: none"> • Personal care (showering, grooming, dressing, toileting) • Activities of daily living (assistance with budgeting, bill paying, reading correspondence, filling out forms, arranging and attending appointments) • Mobility (transfers, use of equipment, transport arrangements) • Community access – programs, community services, mainstream services, friends, family • Communication (use of equipment and systems to ensure that clients can communicate their needs and develop social networks) • Health care support (medication management, other) • Behaviour management (as per behaviour management plans) • Therapy support (as per programs from approved therapists e.g. physiotherapists, occupational therapists, speech therapists, etc.)
Intensive tenancy support	Services undertaken with ITS clients where ITS targets are included in the agency's service agreement.
Boarding house support	Support provided to clients residing in Boarding Houses in the metropolitan area to help them sustain their accommodation and/or access other more suitable forms of housing where your service agreement includes targets for metropolitan boarding house support.
Outreach support	Services provided to clients in an outreach setting.
Post Crisis Support	Services to clients who have been stabilised and are at the stage where agency support is being ended.

Support to engage	Specific to homeless connect and DVCL service. This service element involves telephone support to clients to engage with the SHS, or DV&AFV sectors, and other relevant government and non-government organisations. Support to engage will continue until a referral has successfully engaged with the Specialist Homelessness Sector, or a client no longer needs gateway support.
Supportive housing packages	Services provided to clients living in Supportive Housing Package properties where Supportive Housing targets are included in your Service Agreement.
Motel support	Services provided to clients placed in motel accommodation due to a lack of alternative crisis accommodation options.
Waitlist support	Support provided to any client who is awaiting accommodation, or a case plan to be started.

Icons in H2H

Icon	Definition	Location
	tool tip – hovering mouse over this icon will reveal a description or definition for the relevant area it is placed	system wide
	Found at the end of a row of a possible matching client record during the duplicate check process. Selecting this icon discards your draft client and redirects to the selected clients record	duplicate check (add client process)
	indicates that a search result is a client of your lead agency, or you were the last lead agency to work with the client	search clients
	indicates an alert on the client record. Open the client summary page to read the alert	search clients
	when seen on a search result, indicates your agency is a consented agency for this client	search clients
	when seen in the intake, indicates that a panel has been completed	intake
	when seen in the case plan summary page, indicates that an issue has been resolved	case plan
	when seen in the end support or case exit, indicates that a panel has been completed	end support/case exit
	client record is set to sensitive	search clients
	client record is set to locked	search clients
	Found at the end of a row listing a client record. Selecting this button creates a new draft client, based on this client's details (useful when adding multiple family members who have similar personal details)	search clients
	Edit button. Selecting will open certain fields to be edited such as end dates, descriptions, personal details, etc.	system wide
	Indicates that service is still open (end date has not passed/or has not been closed)	services
	Indicates a consented service (a service provided by a non-lead agency) that is pending (has not been actioned by the lead agency)	services
	Indicates that the service is still open, and it has passed its end date and requires closing. The service must be closed by the agency that provided it	services
	Select to withdraw a client referral, an internal service referral, or a consented service. This button will only be available if the referral is in pending state	referrals (client/service)
	Indicates a service that has closed	services
	indicates a service that has been closed and saved as 'entered in error'.	services
	Repeat service button (only available when the service is closed). Clicking this icon will create a new service with most fields pre-populated	services
	found when adding an address. Will bring up a suburb search tool to locate suburbs and their postcode	housing panel
	Pending service referral that has not been accepted, or consented service notification not accepted by lead agency	services
	Referred or consented service that has been rejected	services

Glossary of common terms

Common terms	
Agency	The physical location (or service outlet) where the funded program is operated. It is possible to have one program operate from multiple agencies and multiple programs operate from one agency.
AIHW	Australian Institute of Health and Welfare is an independent statutory authority set up by the Australian Government to provide reliable, regular and relevant information and statistics on Australia's health and welfare.
At risk of homelessness	<p>A person is at risk of homelessness if they are at risk of losing their accommodation or they are experiencing one or more of a range of factors or triggers that can contribute to homelessness.</p> <p>Risk factors include:</p> <ul style="list-style-type: none"> • Financial stress (including due to loss of income, low income, gambling, change of family circumstances) • Housing affordability stress and housing crisis (pending evictions/ foreclosures, rental/ or mortgage arrears) • Inadequate or inappropriate dwelling conditions, including accommodation which is unsafe, unsuitable or overcrowded • Previous accommodation ended • Relationship/family breakdown • Child abuse, neglect or environments where child/ren are at risk • Sexual abuse • Domestic/ family violence • Non-family violence • Mental health issues or other health problems • Problematic alcohol, drug or substance use • Employment difficulties and unemployment • Problematic gambling • Transitions from custodial and care arrangements, including out of home care, independent living arrangements for children aged under 18, health and mental health facilities/ programs, juvenile / youth justice and correctional facilities • Discrimination including racial discrimination (e.g. Aboriginal people in urban rental market)

	<ul style="list-style-type: none"> • Disengagement with school or other education and training • Involvement or exposure to criminal activities • Antisocial behaviour • Lack of family and/ or community support • Staying in a boarding house for 12 weeks or more without security of tenure
Case management	A collaborative process of assessment, planning and advocacy to meet an individual's needs.
Client	A person of any age who receives a direct service from a Specialist Homelessness agency.
Client referral	The process by which the responsibility for the management of a client is transferred from one agency to another.
Consented agency	An agency that has been requested by the lead agency with the consent of a client, to assist in providing support to a referred client that is case managed at a lead agency.
De-identified information	This is information that is gathered from people accessing SHS Agencies for services. The information is carefully selected to ensure that an individual providing the information cannot be identified in any way. It is not possible to look at the information and know who provided it.
Homeless	<p>The AIHW define homelessness as:</p> <p>A person is homeless if they are either:</p> <ul style="list-style-type: none"> • Living in non-conventional accommodation or 'sleeping rough', or • Living in short-term or emergency accommodation due to a lack of other options
Lead agency	<p>An agency where a client presents or is referred to for assistance with homelessness.</p> <p>The lead agency is responsible to provide a lead role in the support of a client, in most instances through a case managed response.</p>
Life domains	Life domains are groups that separate common issues or behaviours that a person may need assistance with into categories.
NAHA	The National Affordable Housing Agreement provides the framework for the Commonwealth and the States to work together to improve housing affordability and homelessness outcomes for Australians.
NDCA	National Data Collection Agency is the national information system that combines information from both SHS Agencies and State/Territory and Commonwealth funding departments.
Non-conventional accommodation	<p>Non-conventional accommodation is defined as:</p> <ul style="list-style-type: none"> • Living on the streets • Sleeping in parks

	<ul style="list-style-type: none"> • Squatting • Staying in cars or railway carriages • Living in improvised dwellings • Living in the long grass <p>This definition aligns closely with the cultural definition of primary homelessness.</p>
Organisation	The legal entity that is funded to deliver a program and enters into the Service Agreement with the Department of Human Services
Presenting unit	<p>A presenting unit is a client or group of clients that present together to a Specialist Homelessness agency. People who do not receive a service, and are therefore not clients, are not included in the presenting unit. This may include children who present with a parent or guardian but do not receive any services themselves.</p> <p>Presenting units may be:</p> <ul style="list-style-type: none"> • A group including unrelated people • A person alone • A person with child/ren • A couple with child/ren • Siblings • Multi-generational family
Presenting unit head	<p>The spokesperson or main contact person of a presenting unit. To be able to understand the composition of a group presenting to your agency it is important to be able to relate people within the group. This is done by relating the members of the group to a person who is nominated as the presenting unit head. If there is a child/ren under 18 years old present the presenting unit head is the spokesperson who is:</p> <ul style="list-style-type: none"> • The parent/ guardian representing any child/ren under 18 years old • The most direct relation to any child/ren if there is no parent/ guardian present • If there are no child/ren under 18 years old present the presenting unit head is the spokesperson who is: • The spouse/ partner of another person within the presenting unit • Related in some way to another person within the presenting unit

<p>Service Referral</p>	<p>A service referral occurs when a client needs a service that your agency is not able to provide. A service referral is then sent to another agency to provide that service.</p>
<p>Short-term or emergency accommodation</p>	<p>Short-term or emergency accommodation includes:</p> <ul style="list-style-type: none"> • Refuges • Crisis shelter • Couch surfing • Living temporarily with friends and/or relatives • Insecure accommodation on a short-term basis • Emergency accommodation arranged by a Specialist Homelessness agency (e.g. hotels, motels etc.) <p>The following short-term accommodation options are not considered to be homeless:</p> <ul style="list-style-type: none"> • Hotels, motels, caravan parks and other temporary accommodation used when a person is on holiday or travelling • Custodial and care arrangements, such as prisons or hospitals • Temporary accommodation utilised by a person while renovating usual residence or building a new residence (e.g. weekenders, caravans) <p>This definition aligns closely with the cultural definition of secondary homelessness.</p>
<p>Specialist Homelessness Services Collection (SHSC)</p>	<p>The SHSC provides information about all people, both adults and children, who seek assistance from specialist homelessness agencies. It is comprised of a client collection and an unassisted persons collection. The AIHW manages the collection of data and produces reports on the data to all stakeholders.</p>

<p>Support period</p>	<p>The period a client receives services from your agency is referred to as a support period. A support period starts on the day the client first receives a service from your agency.</p> <p>A support period ends when:</p> <ul style="list-style-type: none"> • The relationship between the client and your agency ends • The client has reached their maximum amount of support your agency can offer • A client has not received any services from your agency for a whole calendar month and there is no ongoing relationship <p>Where a client has an appointment with your agency which is more than one calendar month in the future it is not necessary to close the support period. This is because it is expected that there is an ongoing relationship with the client. There may still be work undertaken in the intervening period on the client's behalf, such as checking on the client or updating case notes, and this should be recorded as services provided.</p> <p>The end of a support period is the day the client last received services from your agency.</p>
<p>Unassisted person</p>	<p>An unassisted person is any person who seeks services from a Specialist Homelessness agency and does not receive any services. A child who seeks a service but does not receive a service would be considered an unassisted person also.</p>