Emergency/Crisis

A Family Service Event
*In the Family Services’ Events tab, click on the green “Add Event” button on the right side of the screen.
*Scroll down the drop down menu to “Emergency/Crisis” and click.*
*This screen will appear.

*Enter the date the need was identified.
*Type a brief description of the emergency/crisis.

Description:
Ran out of fuel oil
*Click on the Service Area box to view the drop down menu.
*Choose the service area that best fits the need you are entering.
*Click on that service area within the drop down menu.
*Click on the Issue box to view the drop down menu.
*Choose the issue that best fits the family's need.
*Click on that issue within the drop down menu.
*In the Source of Information box, choose the option from the drop down menu that best describes how you learned of the situation, and click.
*The Associated With box will automatically populate “Entire Family”.
*You do have the option to change it to an individual enrollee within the family, if you need.
*In that case, you would choose the enrollee’s name in the drop down menu.
*Click on the Case Worker box.
*Either scroll down or begin typing your last name.
*Once you find your name, click on it.
*Click in the Progress box.

*Choose “In Progress” from the drop down menu, and click on it.
*Leave the Date Closed box blank until all actions have a final status entered.

*Once that is complete, enter the closed date and update the status.
*Click the green “Add Action” button.

*Each referral, task, communication, follow up, or direct service in regards to this need identified will be entered as it’s own individual Action.

*You may have multiple Actions listed for one need.
Communication: a conversation or communication in person, over the phone, through text, email, or flyer

Direct: an action to be completed by Head Start

Family Task: an action to be completed by the family

Referral: a referral was given to the family

*This screen will appear.

*From the Action Type drop down menu, choose the most appropriate action type for your entry.

*Depending on the Action Type you choose, more boxes may appear.
*Enter the Scheduled Date as the date you expect the action to be completed by.

*Enter the Action Date as the date you initiated the process for this specific communication, direct service, family task, or referral.
*Click on the Referred To box.
*Either scroll down or begin typing the agency or name the referral is for.
*Once you find the name, click on it.

*Click the Referral Type box.
*Use the drop down menu to click on how the referral was given to the family, Verbal or Written.
*Click on the Type of Contact box.

*Choose from the drop down menu what type of contact you had with the family regarding this action.
Add Action

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Referral</th>
<th>Type of Contact</th>
<th>Home Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled</td>
<td>1/24/19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Date</td>
<td>1/23/19</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Referred To</td>
<td>AEOA - Housing</td>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Referral Type</td>
<td>Verbal</td>
<td>Case Worker</td>
<td></td>
</tr>
</tbody>
</table>

Action Notes

*Type a brief description of the action.*
STATUS OPTIONS

Completed - Receiving Services: The specific action has been finished and the family is now receiving the service.

Dropped - Incomplete: The family dropped from the program and the outcome is unknown.

In Progress: The staff or family is working towards completing the action.

Not Receiving Services - Client Ineligible: The family does not meet eligibility requirements to receive the service.

Not Receiving Services - No Funding: The family may have qualified for service, but the program is currently out of funds.

Refused: The family chooses to not move forward on receiving the service.

*Use the drop down menu to choose “In Progress” until you know the final outcome of the action.

*Once you know the final outcome, update the status.
*Click on the Case Worker box.

*Either scroll down or begin typing your last name.

*Once you find your name, click on it.
*In Action Notes, click the date and user stamp that looks like a clock.

*Type any notes to document actions and follow up.

*Click spell check and update any spelling errors.

*Click the green “Save” button.

*Return to this page to update notes and status as needed.
*You will return to the Emergency/Crisis screen with the Actions box filled in.

*Click the green “Add Action” button for an additional action to this emergency/crisis, and follow the process you just completed.

*Once all actions are entered, click the green “Save” button at the bottom of the page.
Once all actions have a final status entered, update the progress of the emergency/crisis and the date.

*Click the green “Save” button at the bottom of the page.
*Referrals completed in Family Services need attention within the “Family Services Information” tab.

*Review the PIR training on Needs Identified for the next steps.
Questions?

Contact your supervisor for additional guidance.