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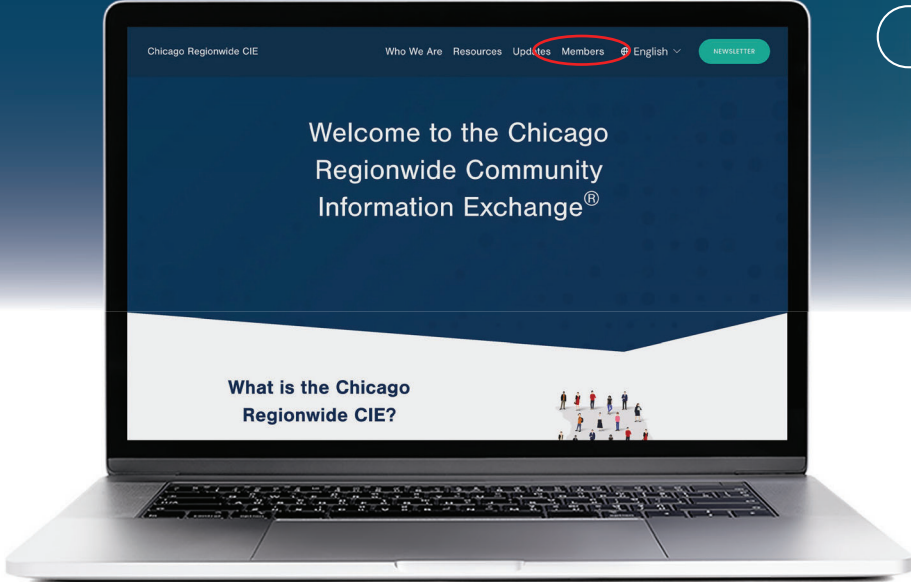


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This guidebook was created with the help of generative AI.



Login Quick Reference Guide



chicagoregionwidecie.org



Key Things to Note

- Demo and live environments have different logins
- CIE team will add new users to both demo and live environments
- Production environment will not be accessible until after training and go-live
- Service directory is the same for both environments
- If you are having difficulty logging in, see Troubleshooting Guide on Common Issues in the Training Participant Guide

Demo Environment	Production Environment
“Sandbox”: practice and play!	Real working environment
Referrals cannot be sent or received	Referrals can be sent and received
Reporting feature not active	Reporting feature active
Not real client data	Real client data



Intake Quick Reference Guide

Step 1: Locate or Enter in Community Member

From the main screen, click on Community Search. Enter the community member's name and click on SEARCH. If the community member's name is displayed, select PROFILE and start the interaction. If this is their first visit, click on ADD.

Community Search

Community members who have interacted with your organization all in one place. You can search and add new community members.

Community Members

SEARCH ADD

First Name	Last Name	DOB (MM/DD/YYYY)	Email	Mobile Phone Number	Home Phone Number	Intake Date	Actions
Alicia	Jones			7327680663		01/08/2024	PROFILE
james	jones	08/25/1979		3734567899		09/22/2023	PROFILE
Jones	Whysk	10/23/1985			7322341623	01/03/2024	PROFILE

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If you click on ADD to enter a new community member, a box will appear for you to complete their information. Once all required information has been entered, click on SAVE.

New Community Member

Anonymous

First Name
Michael

Last Name
Jones

Date of Birth
07/14/1981

Current Location (Enter Zipcode for Best Results)
60601 Chicago city, Cook County, IL

Social Security Number
444-55-6666

Preferred Method of Contact
Mobile Phone

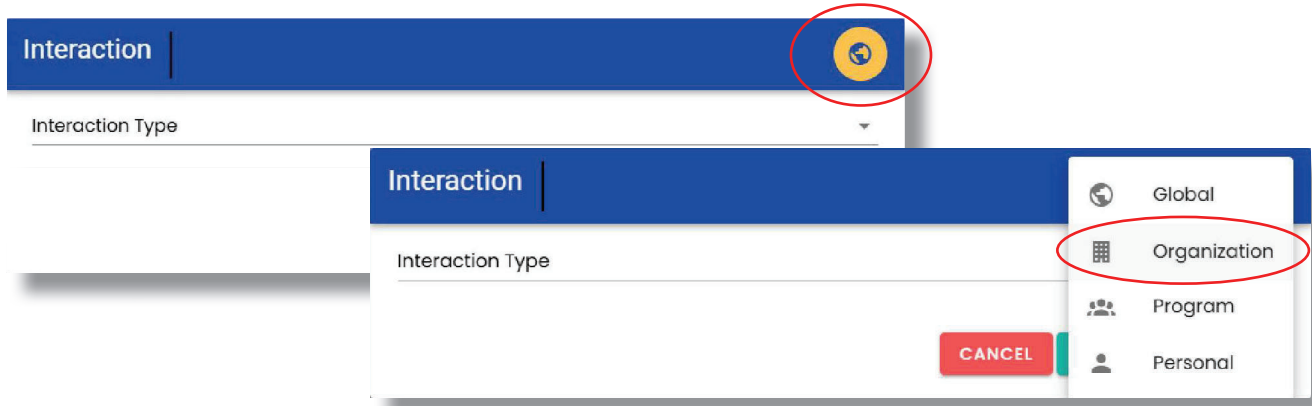
Mobile Phone
+1 (555) 222-3333

CANCEL SAVE

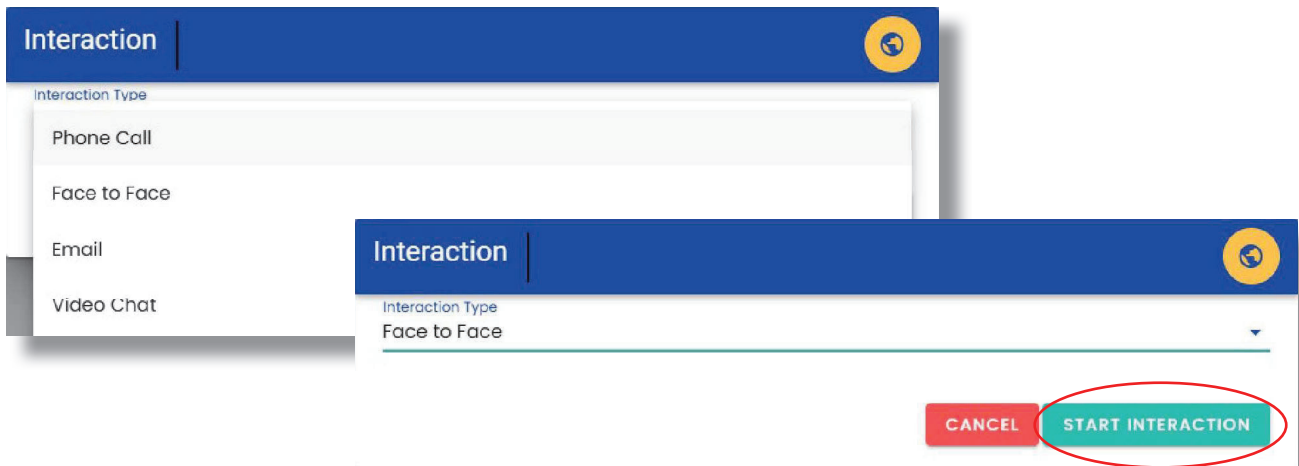


Step 2: Start Interaction

Once you click SAVE, the interaction box will appear. Click on the globe icon, and choose Organization from the drop-down menu.



Use the drop-down menu to select the type of interaction, then click on START INTERACTION.





Step 3: Consent

The Consent window will appear. Complete the necessary information. Consent forms can be customized by your organization administrator based on your organization's requirements. Once completed, click on SAVE.

Michael Jones 44 yrs Contact (555) 222-3333 (Mobile)

CONSENT DASHBOARD CONTACT ADDITIONAL FORMS DOCUMENTS HMIS

You are entering a shelter-based home we collect our information on the alco platform. Do you give consent to share your information.

yes
 no

What are your needs today?
Shelter

Gender
Male

Who are you calling on behalf today?
Self

Are you currently enrolled in a recovery/withdrawal program?
No

SAVE

Step 4: Intake Completion

This completes the basic Tier 1 intake workflow. At this point, the community member would be directed to Tier 2 engagement with a case manager or appropriate organization staff member. The intake workflow is customizable through the company profile set-up done by the organization administrator.