**www.americalearns.net/homesforall**

**HOW TO:** Add Clients (Outputs)

*Each time you have a new client that you are providing a housing service to, you will enter them into America Learns. This section corresponds to Step 1 of the Housing Services Form you will fill out and keep on file at your site. You will submit each Housing Services Form completed to Homes for All program staff on a quarterly basis. This reporting relates to our first performance measure – as a entire Corps, we will provide housing services to 1800 individuals. Housing services is a very broad term – refer to the Homes for All Performance Measures and Activities page in your Member Manual for clarification on what counts as a housing service.* ***Both construction and non-construction members will complete the Housing Services Form and Adding Clients to America Learns.***

*You should be adding clients regularly to the America Learns system – at the very least, monthly. Do not wait until a client maintains, acquires, or transitions into housing to add them into the system.*

1. Log on to America Learns.
2. On the left hand menu, click “Add New Clients and Volunteers”.
3. Click the **third (3rd)** option, “Add new or connect to existing clients and volunteers”.
4. A drop down menu will appear – “Select an Association”
5. Click “Add New Client”
6. Read the text in the red box that instructs how to create a client identifier.
	1. **NOTE:** You may use these instructions **OR** use a service site identifier [examples include: HMIS, Salesforce number, database number, other]
7. **Click** “Continue”.
8. A pop up box will open – “Identifier Settings”.
9. Fill out the identifiers you are able to at this time –
	1. Date Housing Services Started
		1. *This date cannot be earlier than September 1st, 2018, or your first day of service – our program year runs from September 1st, 2018 until August 31st, 2019. This means our reporting period is for those dates. Your client may have been in services before the year began, but we can only count services provided in THIS program year.*
	2. Type of Services Provided
	3. Documentation Supporting Client Eligibility
	4. Birthdate of Client
	5. Number of Adults
	6. Number of Children
	7. Number of Veterans
	8. Number of Active Military
	9. Number of Family Members of Veterans
	10. Number of Family Members of Active Military
	11. Is this client receiving services because of a disaster?
10. At this time – because you are adding clients as you are serving them – you will skip the rest of the identifiers and click “submit”.
11. The pop up box will disappear and the screen will go show the red text box again.
12. **IMPORTANT –** a new section will appear titled “Clients Pending Enrollment” towards the bottom. Make sure to click “Enroll” for your clients to be completely added to the system! **If you do not click “enroll”, all the data you just entered will be gone!**

**REMINDER –** Complete Step 1 of the Housing Services Form.

**HOW TO:** Review Clients You Have Added

1. Log on to America Learns.
2. On the left hand menu, click “Add New Clients and Volunteers”.
3. Select the first option – “See the clients and volunteers you are connected to”.
4. A drop down menu will appear with all the clients you’ve enrolled.
5. **Note:** you can select a client to edit from this menu, if you need.

**HOW TO:** Report Your Client Acquiring, Transitioning Into, or Maintaining Housing (Outcomes)

*This section corresponds to Part 2 of the Housing Services Form you will fill out and keep on file at your site. After your client has acquired, transitioned into, or maintained their housing, you need to report that information. It is part two of our performance measures – 720 of the 1800 clients we serve will be “successfully” housed, meaning they fall into one of those three categories. Again, refer to the Homes for All Performance Measures and Activities page in your Member Manual for clarification on what activities mean a client can be identified as successfully housed.*

1. Log on to America Learns.
2. On the left hand menu, click “Add New Clients and Volunteers”.
3. Click the **first (1st)** option, “See the clients and volunteers you are connected to”.
4. A drop down menu will appear – with all the clients and volunteers you have added.
5. Select the client you are reporting on.
6. A new tab will open up with that client’s dashboard.
7. In the upper right hand corner, click “Edit Attributes”.
8. Complete the boxes that are applicable to you –
	1. Type of Services Provided [only need to update if there changes/additions]
	2. Housing Unit: Total Budget [**ONLY** if you are a construction member]
	3. Type of Construction
	4. Date Transitions Into, Acquires, or Maintains Housing
	5. Documentation Client Transition into or Maintained Housing
9. Click “Update”.

**REMINDER –** Complete Part 2 of the Housing Services Form.

**HOW TO:** Connect to Existing Clients (For sites with multiple AmeriCorps Direct Members)

*This section explains how to connect a member’s profile to existing client accounts. This is only applicable to sites with more than one member serving – for example: Kenny Nickell completes the initial intake and conducts financial literacy sessions with clients, who then transition to Chris Webb for housing focused case management services. Both members may add information to the client’s dashboard since it’s essential we report on* ***unduplicated*** *clients. Another example of when you use this option is if both members provide similar services, but one member enters the client information (Page 1 of Housing Services Form – Outputs) and the second member is responsible for completing the information when a client transitions into, maintains, or acquires housing (Page 2 of Housing Services Form – Outcome). It is up to sites and members to determine how to distribute the reporting efforts equitably.*

1. Log on to America Learns.
2. On the left hand menu, click “Add New Clients and Volunteers”.
3. Click the **third (3rd)** option, “Add new or connect to existing clients and volunteers”.
4. A drop down menu will appear – “Select an Association”
5. Click “Connect to Existing Clients”
	1. Find by Members and search by name
	2. Find by client if you know the identifier
6. Select the identifiers you need to connect to.
7. Click the grey “Request Connection to Selection Clients”.