

ClubHOMS: Documentation of a Phone Contact as an Activity

For use by Clubhouse Program Directors during COVID-19 Emergency

1. Phone call happens
2. Program Director can go to **Clubhouse Sign In form** to enter member ID, OR they can go to **Member look up** and search for a member to sign them in (see screenshot):

The screenshot shows the 'Member Lookup' form. It has a light blue header with the title 'Member Lookup'. Below the title are four input fields: 'Member ID:', 'Member Alias:' (containing 'test'), 'First Name:', and 'Last Name:'. There is a checkbox labeled 'Search primary clubhouse only' and a blue 'Search' button. Below the form is a pagination bar with 'Previous', '1', and 'Next'. The results section shows 'Member ID 700020', 'Name: TestMemberFirst TestMemberLast', and 'EAST CORNER CLUBHOUSE (SSI)' with an enrollment date of 4/1/2019. There are three buttons: 'Current Update', 'Print Member Info', and 'Sign In' (circled in red).

3. Once signed in, user can go to the assistance and supports:

The screenshot shows the 'The San Diego Clubhouse System' interface. A navigation bar at the top includes 'Member Data', 'Staff Forms', 'User Management', 'Reports', 'Documents', and 'Help'. A dropdown menu is open under 'Staff Forms', listing 'Clubhouse Sign-In', 'Assistance/Supports' (highlighted in yellow), 'Outreach Tracking', and 'Member Satisfaction Survey (Anonymous)'. The background shows the 'Member Lookup' form from the previous screenshot.

4. Then create new activity:

ClubHOMS: Documentation of a Phone Contact as an Activity
For use by Clubhouse Program Directors during COVID-19 Emergency

ClubHOMS

The San Diego Clubhouse System

Assistance Support

[Create New Activity](#)

Activity: (Select existing)

Activity Name:

Location: Clubhouse
 Community

Supported Time: Hours Minutes

Type of Support: Coaching

5. Fill out appropriate info:

ClubHOMS: Documentation of a Phone Contact as an Activity

For use by Clubhouse Program Directors during COVID-19 Emergency

Create Activity ✕

Activity Name:

Activity: or start with existing activity.
(Select existing)

Location: Clubhouse
 Community

Supported Time: Hours Minutes

Type of Support:

- Coaching
- Referral
- Linkage
- Advocacy
- Crisis Support
- Reach Out
- (call or visit to existing member)
- Self-help Support
- Other:

Meetings, Groups, and Classes:

- Recovery
- Healthy Choices

(Meeting, Group, or Class)

6. Scroll to bottom of form to “Create new activity”
7. The form will populate fields with what was entered. Scroll to bottom to enter date (same date that the staff signed member in, likely same day). From here, the form will populate members who are currently signed in. You can select said member and click “Add Selected”:

ClubHOMS: Documentation of a Phone Contact as an Activity
For use by Clubhouse Program Directors during COVID-19 Emergency

Facilitator:

Date:

Currently Signed in:

Selected:

8. After the name goes to the "Selected" box, then click Create Event:

Currently Signed in:

Selected:

ClubHOMS: Documentation of a Phone Contact as an Activity

For use by Clubhouse Program Directors during COVID-19 Emergency

9. Go back home and sign out member—you can do this by either (1) looking them up and clicking sign out...

The screenshot shows the 'Member Lookup' form in ClubHOMS. At the top right is an 'Add New Member' button. The form fields are: Member ID (empty), Member Alias (test), First Name (empty), and Last Name (empty). There is a checkbox for 'Search primary clubhouse only' and a 'Search' button. Below the form is a pagination control with 'Previous', '1', and 'Next'. The search results show: Member ID: 700020, Name: TestMemberFirst TestMemberLast, EAST CORNER CLUBHOUSE (SSI), and Enrollment Date: 4/1/2019. Action buttons include 'Current Update', 'Print Member Info', and 'Sign Out - CORNER CLUBHOUSE'. The 'Sign Out' button is circled in red.

Or (2) you can do this by going back to the Clubhouse sign in form, and double clicking their name in the sign in list.

10. Now that the “Phone Call” activity was created in the assistance and supports form, you can re-use it, or you can have staff create a new event each time. Just remember, if creating new events, they need to make sure the name of the event is different each time. We advise to create a standard phone call activity, so that others can use the template instead of having to create new each time, but it’s up to how the clubhouses want to track these (separately, or using same info each time).