

## PROJECT HOMELESS CONNECT – CLIENT SUPPORT/TRIAGE OVERVIEW

**HELLO Client Support/Triage Volunteers!** This provides an overview of the basic process and the various types of assignments available in these areas. Triage is generally handled by experienced clinicians and individuals with experience in case management/services to homeless adults. Client Support volunteers provide MUCH NEEDED skills and support; these positions are ideal for first time and or less experienced volunteers. Client Support also offers a wide variety of assignments that differ in the amount and type of client contact. **THANK YOU for volunteering.**

## PROJECT CONNECT TRIAGE/CLIENT FLOW TRAINING INFORMATION

### PROCESS OVERVIEW:

There are six key volunteer areas in the TRIAGE/CLIENT-FLOW component of Project Connect: Entrance/Exit Support, Greeters, Triage Workers, Client Escorts, Service-to-Service Guides and Hallway Monitors. The client process will also define these roles.

1. Clients arrive at Bill Graham Civic Auditorium (either on their own/in response to flyers or escorted by an Outreach volunteer). **ENTRANCE/EXIT SUPPORT** volunteers – staffing the exterior doors and front hallway – **GREET** the clients and direct them to Triage – the starting point. If clients have shopping carts, backpacks or bags they wish to check, this is handled at this point before clients are directed to Triage. **ENTRANCE/EXIT SUPPORT** volunteers also guide clients to the correct doors and interact with clients who seem lost or out of place.
2. At the Triage area entrance, clients are met by **GREETERS**. **GREETERS** welcome the client (see script), give the client a number and assist the client to a seat with an open **TRIAGE WORKER**. If all Triage stations are currently filled, the **GREETER** will ask clients to wait for the next opening. A specifically assigned **GREETER** will call the next-to-serve number and another **GREETER** will guide that person to the open Triage seat.
3. The **TRIAGE WORKERS** will raise an empty hand when her/his station is open for the next client. The assigned **GREETER** will call the next number and others will guide the client to the open station.
4. **TRIAGE WORKER** will welcome client (see script). First, **TRIAGE** will get client to sign Authorization in the pre-numbered forms packet. **TRIAGE** should fill in the Client ID info at the top of that form (**PLEASE PRINT CLEARLY**) and after the form is signed, proceed with the client's needs assessment.
5. **TRIAGE WORKER** gets the signed Authorization and completely fills out the Triage Form. **TRIAGE WORKER**, when forms are complete, should ask the client what are the things she/he would like to get out of Project Connect today. Use client's requests and the simple assessment of Triage Form (use Form Guide provided at Triage stations) to mark the Service Areas that seem useful to this client on the bottom of the Triage Form. **CIRCLE** the Service Area suggested as first (see Form Guide).
6. When **TRIAGE WORKER** is done with the client, raise the entire forms packet in your hand to call over a **CLIENT GUIDE**. **CLIENT GUIDE** will escort the client over to the Service Area and walk that client to the first service area. Once the client has been connected with the first service table, **CLIENT GUIDE** should return for another client. (This is a walking position!) These **CLIENT GUIDES** will work primarily between Triage and the Service area although some will stay with a particular client for much of the client's PHC experience.

## PROJECT CONNECT TRIAGE/CLIENT FLOW TRAINING

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7. **HALLWAY MONITORS** will be stationed along the client path from Entrance to Triage and Triage to Service Area. These positions will direct clients, connect with clients who seem lost, point out bathrooms, etc. Other **HALLWAY MONITORS** will provide guidance as to areas where clients can or cannot go. This is ALWAYS done with support and encouragement.  
**NOTE:** Bathrooms are located downstairs from the main area. Although elevators will be keyed to only go down to public/client bathrooms, unless you are otherwise notified.
8. Key Service Areas will have a pool of **CLIENT GUIDE** volunteers. These volunteers will GREET clients coming to the area. The persons assigned to the entrance to larger areas will have scripts that share what is available. If need be these persons will also hand out numbers and/or keep track of client order. Other **CLIENT GUIDES** for the assigned area will interact with clients, guide them to the next person who can serve them it's their turn, and guide completed clients to the next Service Station (information at the bottom of the Triage form) so they are checked in there before returning to the assigned area.
9. Some **CLIENT GUIDES** may be assigned a specific client and stay with that person during much of the PHC experience. This is done when clients are having trouble with mobility or understanding, when clients need someone with a non-English language ability, when a good bond has formed and/or when the client is placed in one of the PHC loaned wheelchairs. (NOTE: EVERY wheelchair should go with an assigned volunteer that stays with the person AND the chair.) Such assignments can be coordinated with the leads in your assigned area.

### HELPFUL HINTS IN DEALING WITH AND SUPPORTING PHC CLIENTS:

1. Speak directly to the client – Offer your first name. Ask if you can call them by their first name (It will be on the Triage Form once the client has seen Triage).
2. Tell the client what you are going to do:  
“I’m going to escort you to the Medical Area as I see you are interested in seeing a doctor.”  
“Since this service area is so busy right now (check with the area greeter about status), would you like to go to the food area to get something to eat?”
3. If you are an Escort, gather information at any service area about if and how the client can be seen and share it with the client. **DO NOT BECOME AN ADVOCATE** for the client. If you run into barriers, have questions or concerns, check in with your lead person or Scott Walton. AVOID confronting another volunteer. AVOID saying things to the client that add to frustration.
4. Remember that many services have only so many slots. This is why we avoid promising the clients anything ahead of their being screened or seen at a service area. If you are told a service is not available/no longer available, ask where and how the client can be referred to that service once away from the PHC event.
5. Enjoy your chance to interact with people who may not cross your path otherwise. Give support, listen, share what you are comfortable if asked questions, listen, keep the client focused on the efforts of the day, listen, and THANK the client for sharing with you.
6. REMEMBER you are not alone. If you are stumped, concerned, upset, unclear, etc. PLEASE contact you lead and/or Scott Walton. If you have a GREAT STORY (and you very likely will), we want to hear those as well.

## PROJECT CONNECT TRIAGE/CLIENT FLOW VOLUNTEER NOTES:

### BASIC INFORMATION:

- ✓ Wear COMFORTABLE CLOTHES and SHOES. We suggest LAYERS, as temperature is uncertain.
- ✓ If you have one, wear your PROJECT CONNECT T-shirt. If you don't have one, you will receive a Project Homeless Connect t-shirt on the day of this event.
- ✓ PACK LIGHT. There will be limited storage for personal belongs. HINT: If you need it, bring it so you can carry it – See, a use for the cargo pants! If you don't need it for Project Connect – leave it at your office or home!
- ✓ **PLEASE REPORT to BILL GRAHAM at 8:30 AM.** Final Updates and Event Rally – 9:00 AM. Final placement and instructions follows – please move quickly and cooperate with final instructions. **DOORS OPEN/CLIENTS arrive at 10AM!**
- ✓ PLEASE check-out and check-in with the lead for your particular assignment area when you need to take a break or get food. **PLEASE DO NOT DISAPPEAR**, even for a short time, without giving us a chance to fill in with a replacement if needed.

### PROCESS INFORMATION:

- ✓ TRIAGE WORKERS: This is truly Triage. Please do not get caught up in answering all questions a client might ask. Let them know that many answers will be available in the Service Area.
- ✓ Media may be present. Please direct media to Scott Walton. Don't hesitate to NICELY ask a media person to give you and your immediate client some privacy if either you or the client feel uncomfortable.
- ✓ MAYOR NEWSOM is likely to come through the area. If asked a question, please answer and direct the Mayor to the lead in your area.

### CLIENT INFORMATION:

- ✓ If Clients ask for specific information or promises of service (Will I get housing today?), explain that those issues will be addressed when the client gets to the Service Area. Also, add that the information you are collecting will be needed to help them.
- ✓ **PLEASE, PLEASE, PLEASE! - Do NOT Promise a Client any service, unless you are the one who is making the appointment or signing them up for the service.** When you say “maybe”, clients hear promised. Avoid statements like, “Maybe you'll get...” or “Some will get”  
As an alternative, say: **“In order to find out if you are eligible for \_\_\_\_\_ service, let me take you/direct you to that service area.”** Or, upon arriving at a service area, **“This is \_\_\_\_\_; I brought him to Medical because he is interested in seeing a doctor.”**