



# Engage

Cold Weather Shelter /  
Warming Center Training

# Agenda

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# Engage Overview

**Nutmeg Consulting** has built a stand-alone system to make mobile data collection as easy, efficient and helpful as possible.

**It's a great tool for "Assertive Engagement", helping outreach teams stay connected with their clients in the field.**

# Key Features

- Make common case management functions of data entry fast and able to be done at the client's location
- Provide useful tools to Outreach, Cold-Weather Shelter and Warming Center staff both in the field and at the management level
- Works both online (cellular or wifi) and offline (with limitations)
- Replace tools such as paper forms, smartsheets, spreadsheets and general tools that are missing key features or don't "talk" to each other

# Important Notes

- Support is centralized at [CTHMIS.com/coldweather/](https://CTHMIS.com/coldweather/)
- This is a version 1.0 product!
  - May have some bugs, please report them via the portal!
- Features are basic but new improvements will roll out rapidly (Check release notes)

# End User Security Notes

- Users are required to implement MFA to log into Engage
  - [Android MFA app](#)
  - [iPhone MFA app](#)
- Your phone MUST have a passcode to use [this app](#) (policy)

# Technical Security Notes

## Show this to your IT Department/Staff

- All Data is encrypted using industry standard best practices
  - On the phone itself
  - When data is transmitted between the the Engage Mobile Client and the Engage Server
  - Runs on a server with
    - Sophos Managed threat response
    - A Web Application Firewall

# What Can Engage Do?

- Create Client records (online and offline)
- Load clients from the CT HMIS Database
- Add an ROI
- Record an “Engagement” *Note: We are considering renaming this to a “Contact” in the future.*

## Engagements contain:

- Enrollments (Create or Link)
  - New Enrollments: Assessments Pending Status!
- Services
- Case Notes
- Current Living Situation Assessments
- Location

# Where Can It Run

- On your phone (iPhones or Android phones)
- Tablets (iOS or Android OS)
- In your browser (Windows or macOS and all current major browsers)

# Screen Translation

## Engagement / Contact

- Container for each engagement/Contact event.

## Current Living Situation

- Living Situation and Start Date for Living situation

## Services

- A simplified quick service selection screen.

## Case Notes

- Simple Casenote field

## Current Location

- GPS and Location

Engage  

CAN → 211 Eviction Prevention →

### New Engagement

#### Current Details

**Current Status of Engagement:** In Progress

**Name:** Lubowitz, Sylvester

**DOB:** 5/8/1980

**Gender:**

**Race:** Asian

**Last known living situation:**

#### New Assessment

#### Current Living Situation

Living situation:

Living situation started:  

#### Services

#### Added Services:

#### Case Note

Case Note Summary:

Case Note:

#### Current Location

Location:



**Demo Time!**

The bottom of the slide features a decorative graphic consisting of several overlapping, wavy lines in various shades of blue, ranging from light cyan to a deep navy blue. These lines create a sense of motion and flow, curving upwards from the bottom edge towards the center of the slide.

# Demo Agenda

- Navigation
- Caseload screen (Home)
- Finding a client & loading an existing client
- Finding a client & creating a new client
- Tour of Engagement (Brief)
- Client Profile
- Add Client to Cold Weather/Warming Center Lists
- Add Bed Night / Warming Center Visit service

# Best Practices

- Real Time Data Entry is **HIGHLY Encouraged**
- **“Just After” is nearly as good**
- Start your day by updating your caseload - focus on clients you are likely to work with.
- Take advantage of the **Pause Engagement** button
- Voice to Text on your phone - use for quicker data entry of case notes
- The Legal Name is the best name

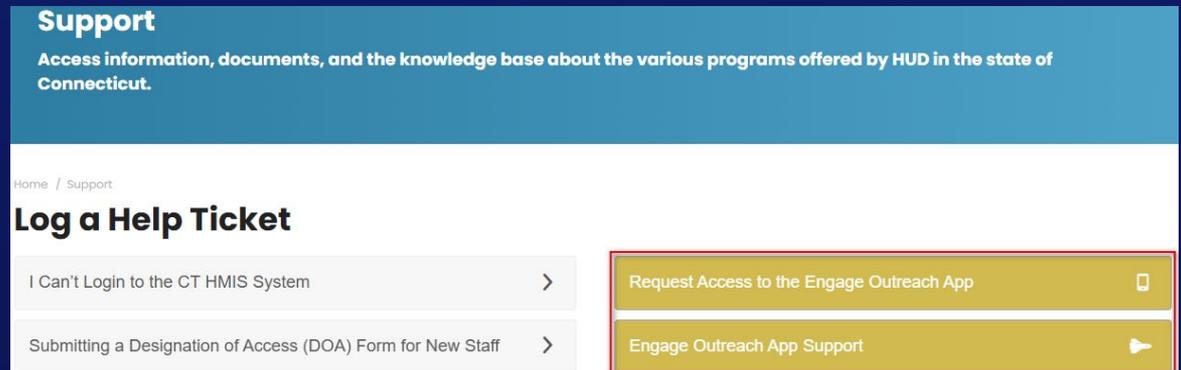
# The Future (Roadmap)

Lots of things, current **high priority items**

- **Bug Fixes (Immediate Priority)**
- Bed / Seat Capacity limits and status at top of list
- Bed / Seat History view
- Bed availability dashboards

# In Closing

- Remember Support is centralized at [CTHMIS.com/coldweather/](https://CTHMIS.com/coldweather/). Use that url to:
  - Request Access to Engage
  - All KB articles and support forms can be found at [CTHMIS.com/coldweather/](https://CTHMIS.com/coldweather/) and also linked at [Engage.nutmegit.com](https://Engage.nutmegit.com) in case you forget!
- Attendees will receive an email with their login information after attending the webinar (no later than 11/17/25)
- Feedback welcome!
- Need help installing?



**Support**  
Access information, documents, and the knowledge base about the various programs offered by HUD in the state of Connecticut.

Home / Support

### Log a Help Ticket

|   |   |
|---|---|
| I Can't Login to the CT HMIS System >                         | Request Access to the Engage Outreach App  |
| Submitting a Designation of Access (DOA) Form for New Staff > | Engage Outreach App Support                |

# Installing Engage

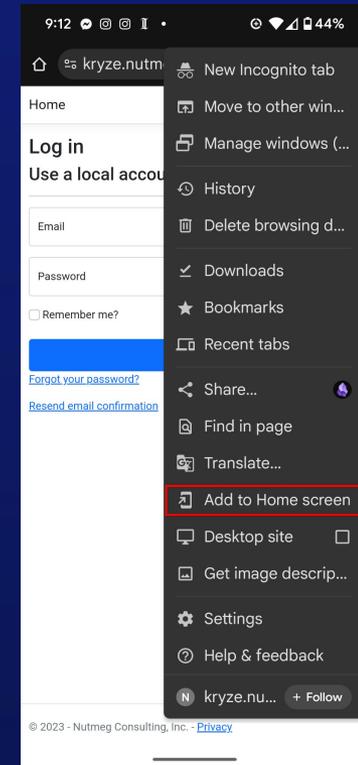
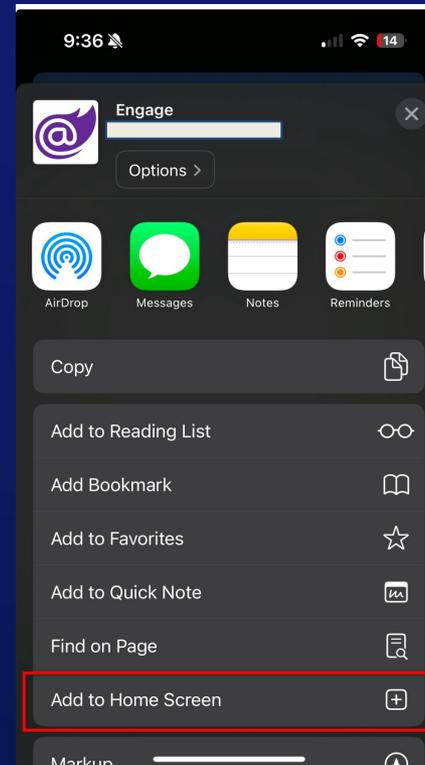
Visit on your phone or desktop:

<https://engage.nutmegit.com/> (LIVE)

Installation not required  
before training.

Full Instructions at:  
[CTHMIS.com/coldweather/](https://CTHMIS.com/coldweather/)

You **MUST** reset your password to  
log into Engage.





**Web** [NutmegIT.com](http://NutmegIT.com)  
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