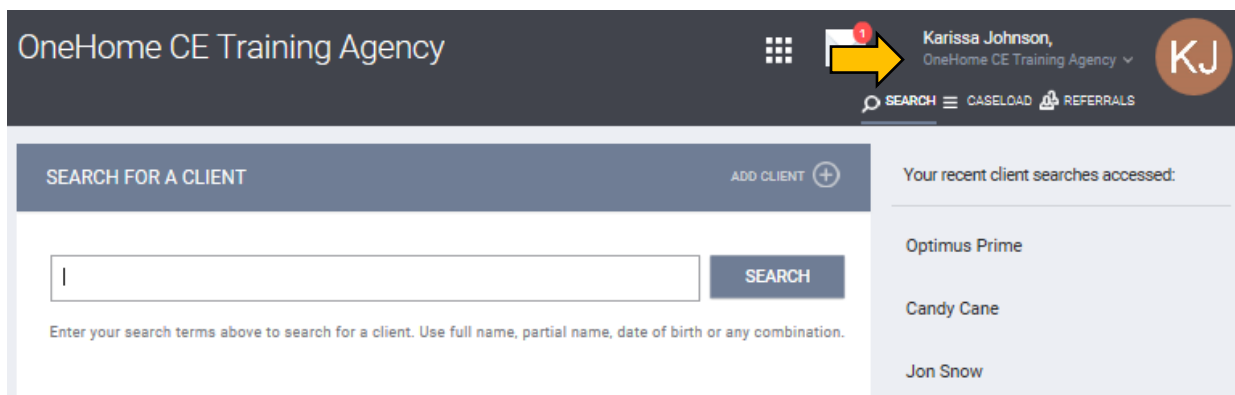


## OneHome Assessment Steps:

1. Select OneHome CE Agency under your name on the right side of the screen
2. Search for client
3. If client does not exist, create new client with ROI
4. Go to Assessment Tab and fill out the PreScreen
5. If Prescreen suggests filling out VISPDAT, go to Programs Tab
6. Enroll Client into the Coordinated Entry Program
7. Fill out HUD Intake
8. Fill Out VISPDAT
9. Check score, if score within range go back into the assessment
10. Fill out Housing Eligibility and Preferences Questions
11. Refer client to Community Queue
12. HMIS Client Contact information

**Step 1:** When you enter HMIS, the first thing you must do is select the OneHome Coordinated Entry option from the drop-down options directly below your name.



OneHome CE Training Agency

Karissa Johnson, OneHome CE Training Agency

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT ADD CLIENT (+)

SEARCH

Your recent client searches accessed:

- Optimus Prime
- Candy Cane
- Jon Snow

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

**Step 2:** Once you are inside the OneHome portion of HMIS, you will be in 'Search' section. Before entering new clients, you must ALWAYS search for the client by name, DOB or SSN. If the client is not already in HMIS, select the 'Add Client' option on the righthand side of the blue bar that says SEARCH FOR A CLIENT.



SEARCH FOR A CLIENT ADD CLIENT (+)

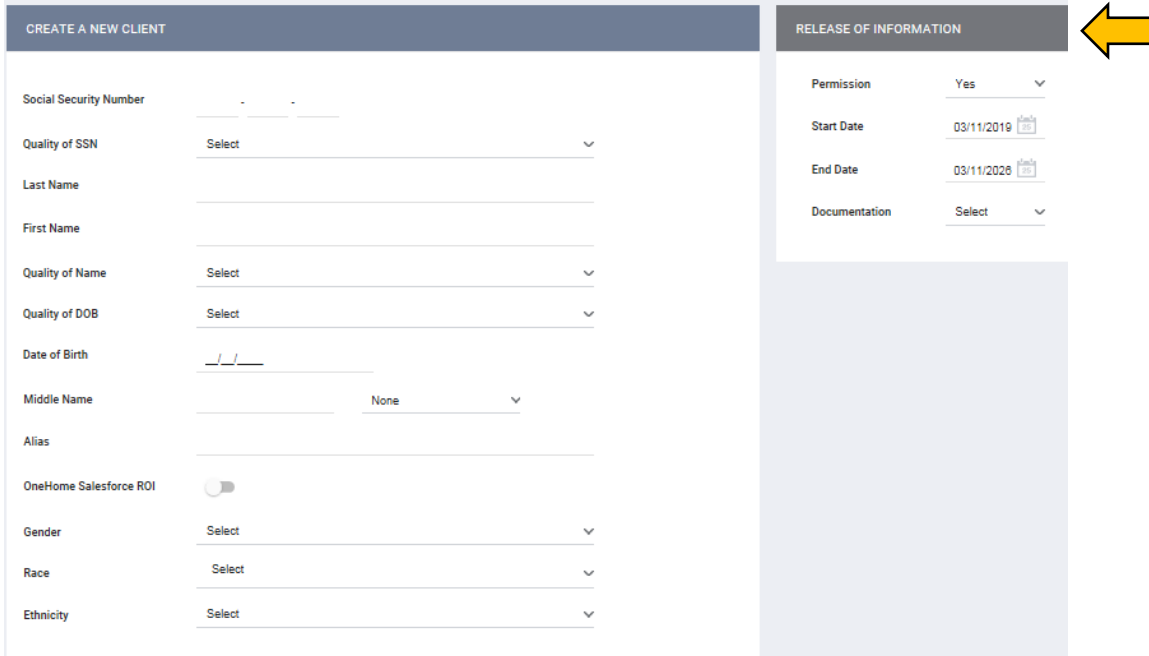
SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

# OneHome Assessor Process Guide

## ENTERING A NEW CLIENT

**Step 3:** Now your screen looks like the image below. Fill in all the pertinent data. You will not be able to move forward if all the information is not filled out. You will also upload the ROI on the right-hand side.



**CREATE A NEW CLIENT**

Social Security Number: \_\_\_\_\_

Quality of SSN:

Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Quality of Name:

Quality of DOB:

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Middle Name: \_\_\_\_\_

Alias: \_\_\_\_\_

OneHome Salesforce ROI:

Gender:

Race:

Ethnicity:

**RELEASE OF INFORMATION**

Permission:

Start Date: 03/11/2019

End Date: 03/11/2026

Documentation:

**Step 3 NOTE 1:** If your client is a Veteran, when you select 'Yes', several additional veteran specific questions will appear. YOU DO NOT HAVE TO FILL OUT THE VETERAN SPECIFIC INFORMATION.

Veteran Status

**VETERAN INFORMATION**

Year Entered Military Service (Year) \_\_\_\_\_ Separated (Year) \_\_\_\_\_

Theater of Operations: World War II

Theater of Operations: Korean War

Theater of Operations: Vietnam War

Theater of Operations: Persian Gulf War

Theater of Operations: Afghanistan

Theater of Operations: Iraq (Iraqi Freedom)

Theater of Operations: Iraq (New Dawn)

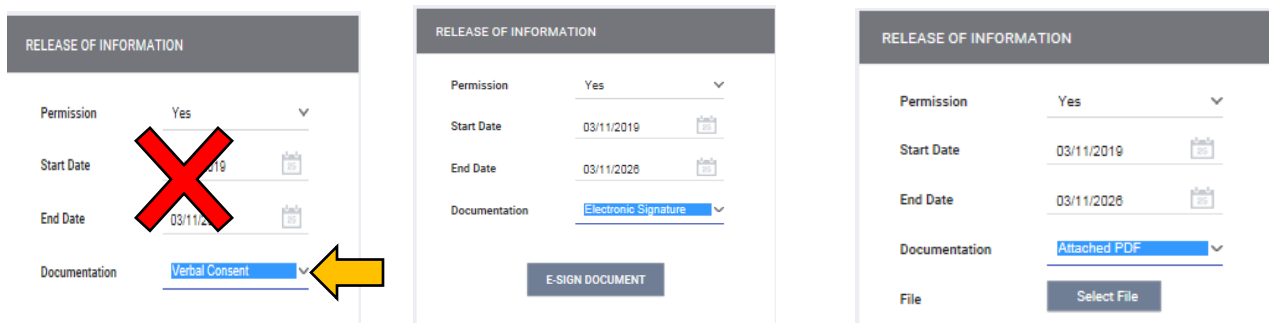
Theater of Operations: Other Operations

Branch of Military

Discharge Status

# OneHome Assessor Process Guide

**Step 3 NOTE 2:** There are 4 drop-down options available for the ROI. You can attach a PDF of the ROI, do an electronic signature or have a signed paper document. Verbal Consent for the ROI is NOT AN ACCEPTABLE ROI collection type. Any record with a 'Verbal Consent' ROI will not be considered for housing resources.

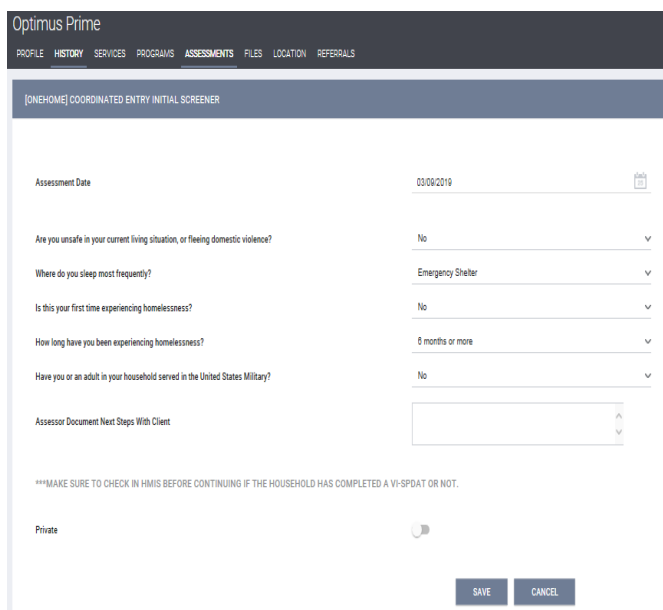
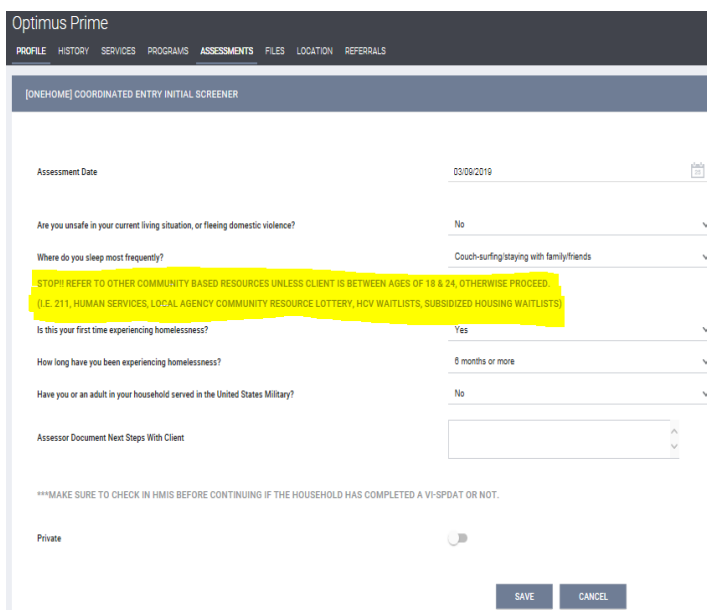


**Step 4:** Once you have successfully entered the new client, select the assessment tab at the top of the page once you are inside the client profile. You will know if you are in the client profile because the client's name will appear in the top left hand corner of the page. In the Assessment Tab you will see the [OneHome] Coordinated Entry Initial Screener. Click start and begin filling it out.



## INITIAL SCREENER

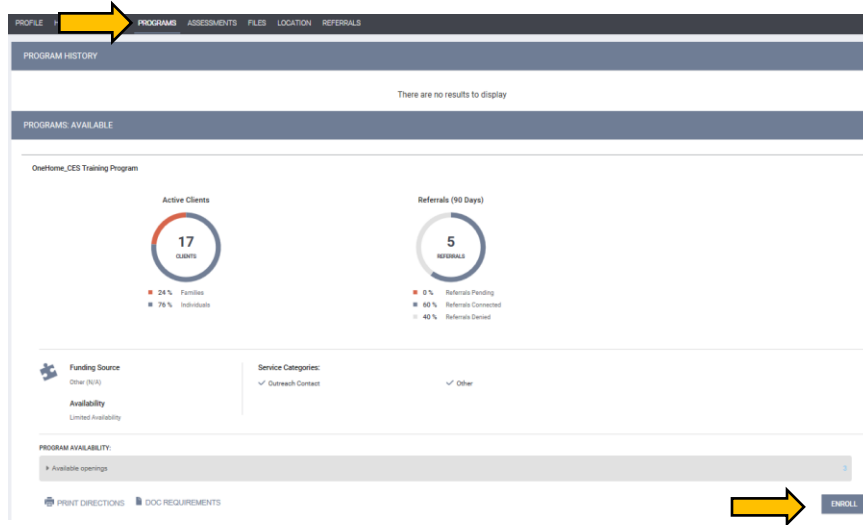
**Step 5:** The Initial Screener was introduced to the OneHome process in April 2018. All participants must fill out an initial screener to see if it is appropriate for them to complete a VI-SPDAT. If a VI-SPDAT is appropriate, the screen will look like the image below on the left. If a VISPDAT is not appropriate, the screen will look like the image below on the right advising you to refer to community-based resources.

# OneHome Assessor Process Guide

## ENROLL INTO COORDINATED ENTRY PROGRAM

**Step 6:** If a VI-SPDAT is recommended, the first thing you need to do is enroll them in the Coordinated Entry program. Select the Programs Tab and enroll the client into the OneHome coordinated entry program by selecting the enroll button at the bottom of the page.



## HUD INTAKE

**Step 7:** Once you enroll someone into the Coordinated Entry Program, you will be directed to this screen. This is the HUD Intake Screen. The INCOME, BENEFITS AND HEALTH INSURANCE sections at the bottom, all have expanded questions that will only appear if you select 'Yes'.

Enroll Program for client Optimus Prime

Project Start Date: 03/11/2019 Click to edit

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

**LIVING SITUATION**

Type of Residence: Place not meant for habitation

Length of Stay in Prior Living Situation: One month or more, but less than 90 days

Approximate Date Homelessness Started: 03/04/2018 Click to edit

Number of times on the streets, in ES, or Safe Haven in the past three years: Three Times

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years: Ten Months

**DISABLING CONDITIONS AND BARRIERS**

Disabling Condition: Yes

Physical Disability: Yes  Long Term Yes

Developmental Disability: No

Chronic Health Condition: No

HIV - AIDS: No

Mental Health Problem: Client refus

Substance Abuse Problem: Drug Abuse  Long Term No


Domestic Violence Victim/Survivor: Yes  Last Occurrence Three to six months a

Are you currently fleeing? Yes

**CASH INCOME FOR INDIVIDUAL**

Income from Any Source: Select

# OneHome Assessor Process Guide



**CASH INCOME FOR INDIVIDUAL**

Income from Any Source: No

**NON-CASH BENEFITS**

Receiving Non-Cash Benefits: Yes

Supplemental Nutrition Assistance Program (SNAP):

Special Supplemental Nutrition Program for Women, Infants, and Children (WIC):

TANF Childcare Services:

TANF Transportation Services:

Other TANF-Funded Services:

Other Non-Cash Benefit:

**HEALTH INSURANCE**

Covered by Health Insurance: Yes

MEDICAID:

MEDICARE:

State Children's Health Insurance Program:

Veteran's Administration (VA) Medical Services:

Employer-Provided Health Insurance:

Health Insurance Obtained Through COBRA:

Private Pay Health Insurance:

State Health Insurance for Adults:

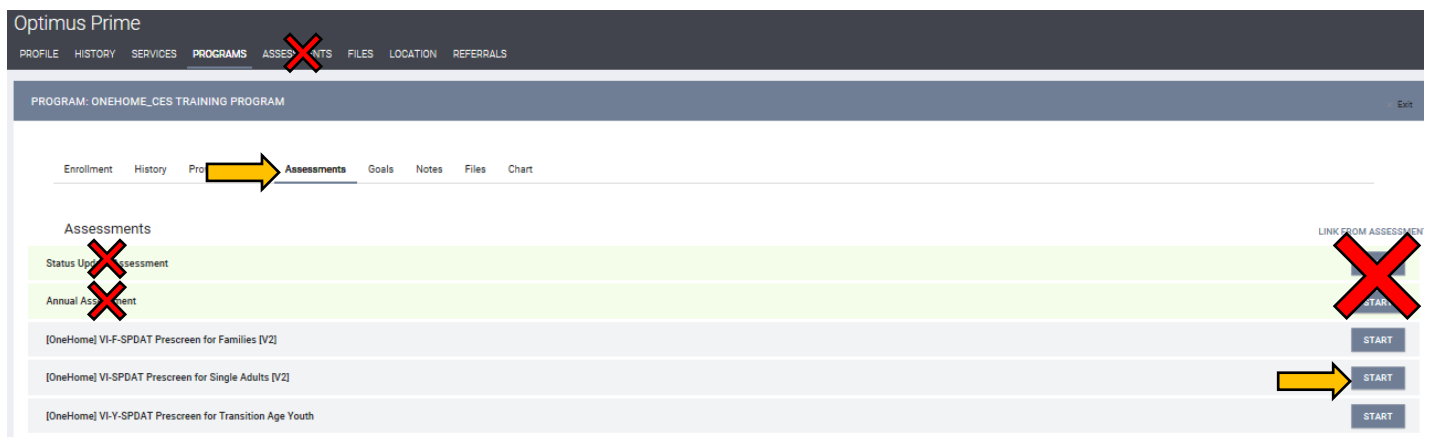
Indian Health Services Program:

Other Health Insurance:

## VI-SPDAT ASSESSMENT

**Step 8:** Once the HUD Intake is completed you'll be redirected to the screen pictured below. You'll notice an additional ribbon of tabs inside the client's profile. The VI-SPDAT Assessments can only be found in the Client Level Assessments tab, located under the blue ribbon, NOT under the client's name.

The Assessments tab includes all VISPDAT types as well as two other HUD assessments that you will never be required to fill out for coordinated entry. Ignore those.



Optimus Prime

PROFILE HISTORY SERVICES ~~PROGRAMS~~ ~~ASSESSMENTS~~ FILES LOCATION REFERRALS

PROGRAM: ONEHOME\_CES TRAINING PROGRAM

Enrollment History **Assessments** Goals Notes Files Chart

Assessments

Status Update Assessment ~~X~~

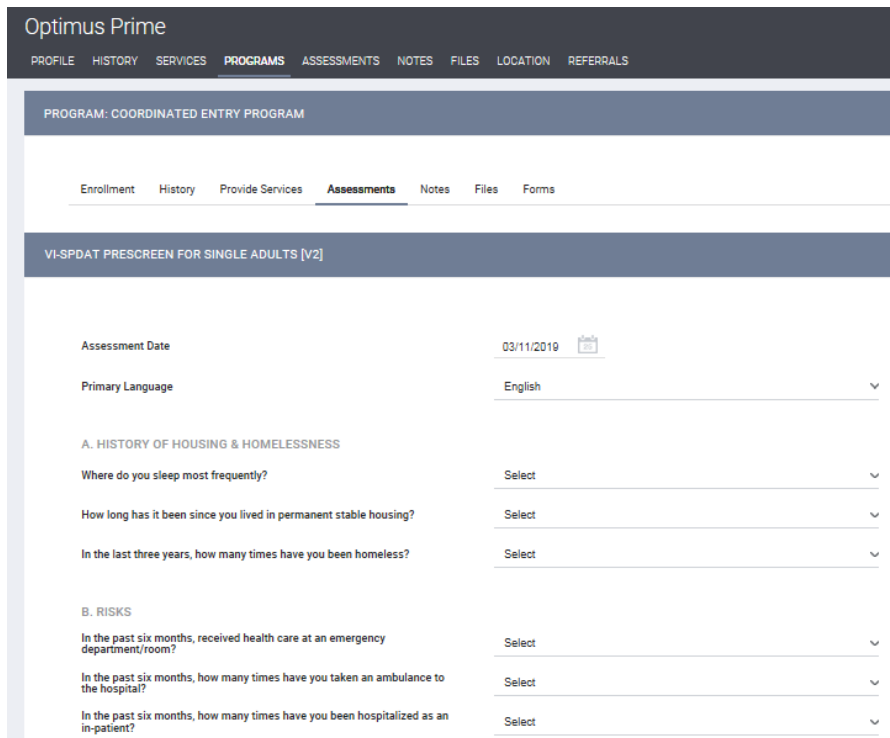
Annual Assessment ~~X~~

[OneHome] VI-F-SPDAT Prescreen for Families [V2] [LINK FROM ASSESSMENT](#) **START**

[OneHome] VI-SPDAT Prescreen for Single Adults [V2] **START**

[OneHome] VI-Y-SPDAT Prescreen for Transition Age Youth **START**

**Step 9:** Once you enter the assessment, the screen should look like this:



Optimus Prime

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION REFERRALS

PROGRAM: COORDINATED ENTRY PROGRAM

Enrollment History Provide Services **Assessments** Notes Files Forms

VI-SPDAT PRESCREEN FOR SINGLE ADULTS [v2]

Assessment Date 03/11/2019

Primary Language English

A. HISTORY OF HOUSING & HOMELESSNESS

Where do you sleep most frequently? Select

How long has it been since you lived in permanent stable housing? Select

In the last three years, how many times have you been homeless? Select

B. RISKS

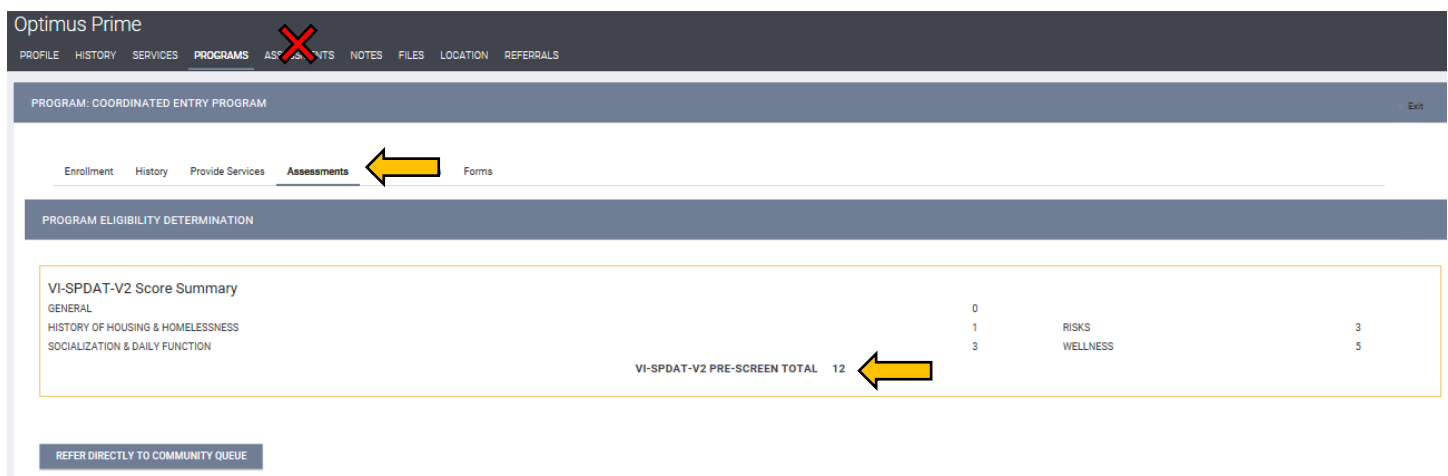
In the past six months, received health care at an emergency department/room? Select

In the past six months, how many times have you taken an ambulance to the hospital? Select

In the past six months, how many times have you been hospitalized as an in-patient? Select

**STEP 9 Continued:** You'll notice all of the responses are drop down options. Some of the options are different than how our community used to collect this data. At the bottom of the screen you'll see an option to "Continue with Housing Eligibility and Preferences Questions. **DO NOT CLICK ON THAT OPTION YET!**

**STEP 10:** Once you go through the entire survey, select the save button at the bottom, BUT YOU'RE NOT FINISHED YET! Once saved, you'll be redirected to the screen below. If the score is .4 or above, you'll need to go back into the assessment to complete the housing eligibility and preferences questions. To go back into the assessment, click the assessment tab



Optimus Prime

PROFILE HISTORY SERVICES **PROGRAMS** ~~ASSESSMENTS~~ NOTES FILES LOCATION REFERRALS

PROGRAM: COORDINATED ENTRY PROGRAM

Enrollment History Provide Services **Assessments** Forms

PROGRAM ELIGIBILITY DETERMINATION

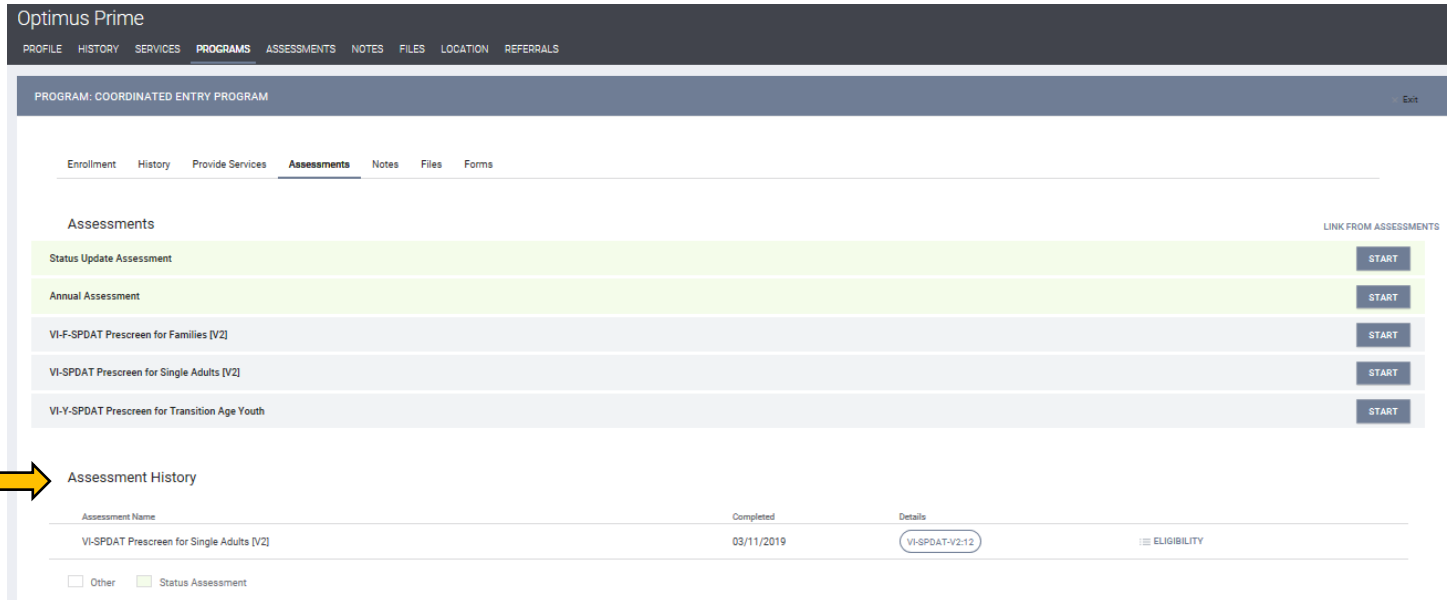
VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	3
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	5
<b>VI-SPDAT-V2 PRE-SCREEN TOTAL 12</b>			

REFER DIRECTLY TO COMMUNITY QUEUE

## Housing Eligibility and Preferences

**STEP 11:** Once you click the assessment tab, your screen will look like the picture below. Go to the Assessment History Section to edit the survey. To edit survey hover mouse over the left hand side of the name of the assessment and an edit option will appear. Click that.



Optimus Prime

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION REFERRALS

PROGRAM: COORDINATED ENTRY PROGRAM Exit

Enrollment History Provide Services **Assessments** Notes Files Forms

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	<span>START</span>
Annual Assessment	<span>START</span>
VI-F-SPDAT Prescreen for Families [V2]	<span>START</span>
VI-SPDAT Prescreen for Single Adults [V2]	<span>START</span>
VI-Y-SPDAT Prescreen for Transition Age Youth	<span>START</span>

**Assessment History**

Assessment Name	Completed	Details	
VI-SPDAT Prescreen for Single Adults [V2]	03/11/2019	VI-SPDAT-V2-12	ELIGIBILITY

Other  Status Assessment

**Step 12:** Now, you can scroll to the bottom of your completed survey and switch on the Housing Eligibility and Preferences Questions.

VA or MDHI Staff?

Continue with housing eligibility and preferences questions  

FOR TRI-MORBIDITY REFERENCE ONLY: NO DATA INPUT

SAVE CANCEL

When you click the toggle, more questions will appear. Once you have completed all questions, click save again.

Continue with housing eligibility and preferences questions

Which county would you prefer to live in?

ARE THERE OTHER HOUSING CONSIDERATIONS THAT ARE IMPORTANT TO YOU?

Community Resources

Close to School

Work

Transit

Medical Care

Other

DO YOU HAVE ANY OTHER HOUSING NEEDS?

Wheelchair Accessible

Extra Bedroom for Live-in Care

Elevator

Service Animal

Other

Would you consider, or do you prefer shared housing (living with someone you haven't met yet)?

ARE THERE ANY OF THE FOLLOWING TYPES OF HOUSING YOU ABSOLUTELY WILL NOT LIVE IN EVEN IF IT WAS THE ONLY HOUSING SLOT THAT WE WOULD HAVE AVAILABLE FOR YOU?

Project Based

Scattered Site

Subsidized

## REFERRING TO THE COMMUNITY QUEUE:

**Step 13:** Once the VI-SPDAT Assessment AND Housing Eligibility Assessments ARE done, there are still a few more things to do. If the client scores 4 and above, you'll select the 'Refer directly to Community Queue' option.

Optimus Prime

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS


PROGRAM: COORDINATED ENTRY PROGRAM Exit

Enrollment History Provide Services **Assessments** Notes Files Forms

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	3
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	5
VI-SPDAT-V2 PRE-SCREEN TOTAL 12			

[REFER DIRECTLY TO COMMUNITY QUEUE](#) 

**STEP 14:** When you select the refer button, you'll be brought to this screen. Click Send Referral at the bottom of the screen. Now the client is in the community queue. The community queue is where the OneHome Coordinators pull names for housing vacancies.

Optimus Prime

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS FILES LOCATION **REFERRALS**

REFERRAL: ADD


Referred Program: Community Queue

Referred to Agency: Community Queue

Referring Agency: OneHome CE Training Agency

Private:

B I [icon] [icon]

[SEND REFERRAL](#) 



# OneHome Assessor Process Guide

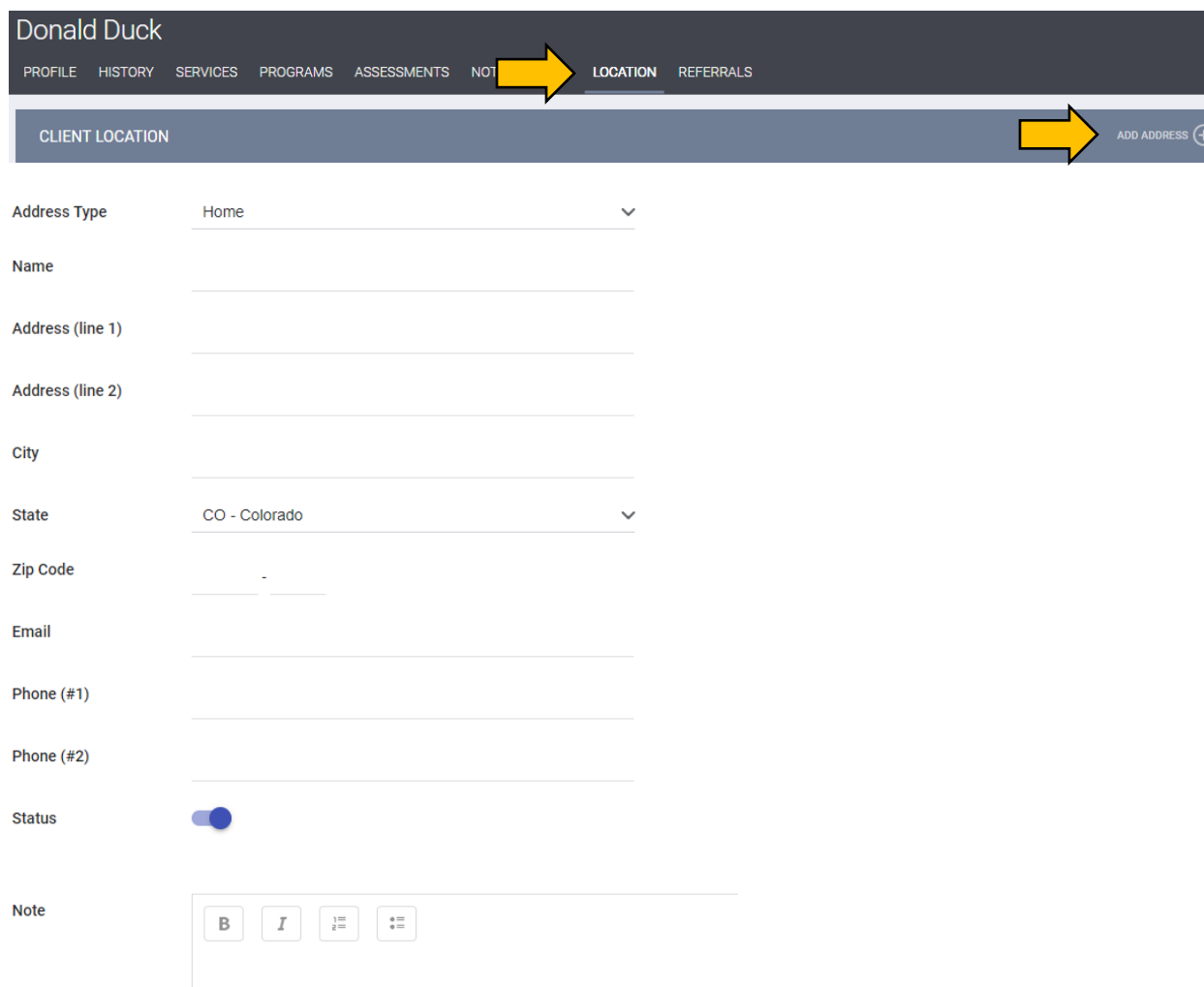
## HMIS Client Contact Information – Form & Instructions

Date: M/DD/YYYY \_\_\_\_\_ Client Name: \_\_\_\_\_

**Instructions:** To update client contact information at intake or during assessment or follow-up encounters, search for client and select the “Location” tab at the top. You will then click on the “+” sign labeled “Add Address” or you can update an existing address by clicking on the edit button to the left

### Fields:

- **Address Type:** Home = client info. Other selections include: Work, Mailing, Emergency, Mother, Father, Spouse, Other, Message, Emergency Shelter and more.
- Name = Client (if Home) or other person if this is another person’s contact info to get ahold of client
- Fill out info that you have, but not critical to capture all
- **KEY FOCUS: Phone Information and Email address**
- Note field SHOULD include description of this contact address, ie “Client Cousin”, “Other Case Manager from [Agency]”, “Father Woody’s”, etc
- Each contact is a separate address



Donald Duck

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTIFICATION **LOCATION** REFERRALS

CLIENT LOCATION ADD ADDRESS +

Address Type Home

Name

Address (line 1)

Address (line 2)

City

State CO - Colorado

Zip Code



Email

Phone (#1)

Phone (#2)

Status

Note

B I  



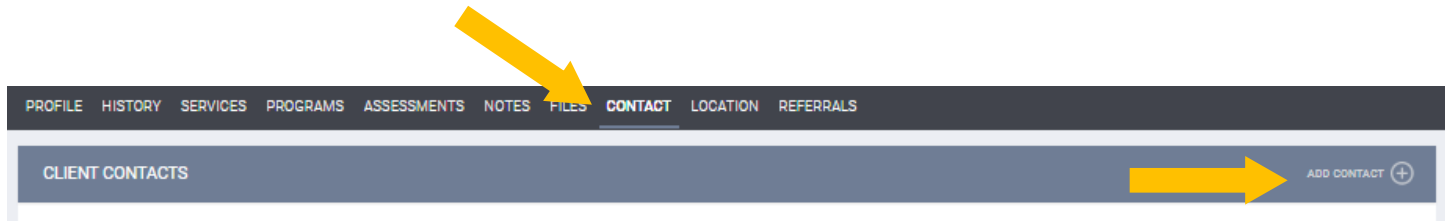
# OneHome Assessor Process Guide



## HMIS Client Contact Information – Form & Instructions

Date: M/DD/YYYY \_\_\_\_\_ Client Name: \_\_\_\_\_

Instructions: To update client contact information at assessment or follow-up, search for client and select the “Contact” tab at the top. You will then click on the “+” sign labeled “Add Contact” or you can update an existing address by clicking on the edit button to the left.



### Fields:

- Address Type: Home = client info. Other selections include: Work, Mailing, Emergency, Mother, Father, Spouse, Other, Message, Emergency Shelter and more.
- Name = Client (if Home) or other person if this is another person’s contact info to get ahold of client
- Fill out info that you have, but not critical to capture every field.
- **KEY FOCUS: Phone numbers and Email address**
- Note field SHOULD include description of this contact address, i.e. “Client Cousin”, “Other Case Manager from [Agency]”, “Father Woody’s”, etc • Each contact is a separate address

**ADD CONTACT**

Contact Type: Client

Email: \_\_\_\_\_

Phone (#1): XXX-XXX-XXXX

Phone (#2): XXX-XXX-XXXX

Active Contact:

Contact Date: \_\_\_/\_\_\_/\_\_\_

Note:   
 [B] [I] [U] [A]   
 \_\_\_\_\_

**SAVE CHANGES** **CANCEL**



# OneHome Assessor Process Guide

## HMIS CLIENT LOCATION/CONTACT FORM -- COLLECT MULTIPLE KEY CONTACTS

Client Name: \_\_\_\_\_

1.  
Address Type (see instructions): \_\_\_\_\_

Name (of contact): \_\_\_\_\_

Address (if applicable-## street, city, state, zip): \_\_\_\_\_

Email: \_\_\_\_\_

Phone #s: \_\_\_\_\_

Note (contact info – who, what, when, etc): \_\_\_\_\_

2.  
Address Type (see instructions): \_\_\_\_\_

Name (of contact): \_\_\_\_\_

Address (if applicable-## street, city, state, zip): \_\_\_\_\_

Email: \_\_\_\_\_

Phone #s: \_\_\_\_\_

Note (contact info – who, what, when, etc): \_\_\_\_\_

3.  
Address Type (see instructions): \_\_\_\_\_

Name (of contact): \_\_\_\_\_

Address (if applicable-## street, city, state, zip): \_\_\_\_\_

Email: \_\_\_\_\_

Phone #s: \_\_\_\_\_

Note (contact info – who, what, when, etc): \_\_\_\_\_

4.  
Address Type (see instructions): \_\_\_\_\_

Name (of contact): \_\_\_\_\_

Address (if applicable-## street, city, state, zip): \_\_\_\_\_

Email: \_\_\_\_\_

Phone #s: \_\_\_\_\_

Note (contact info – who, what, when, etc): \_\_\_\_\_