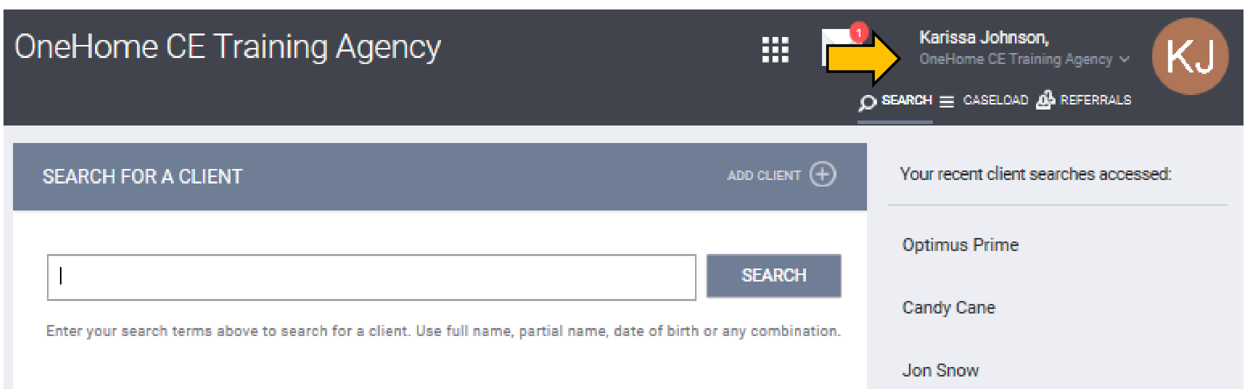
OneHome Assessor Process Guide

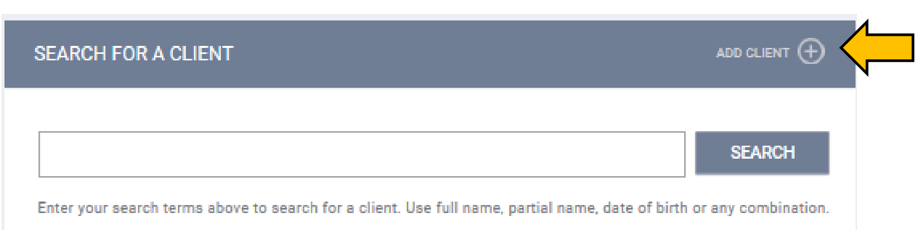
OneHome Assessment Steps:

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.



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.



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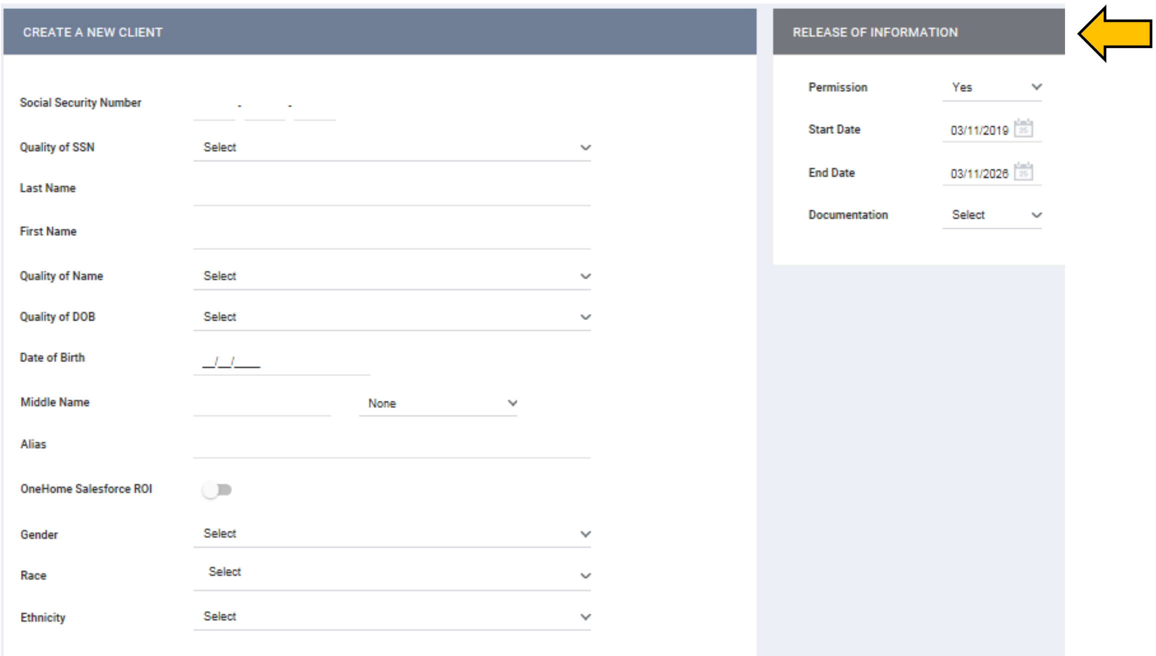
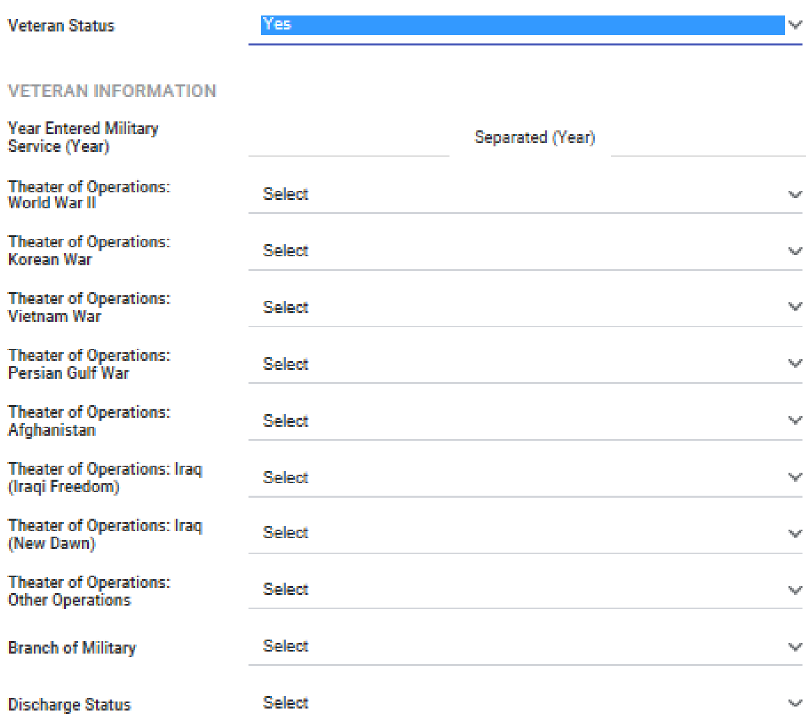
ENTERING A NEW CLIENT

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.



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.



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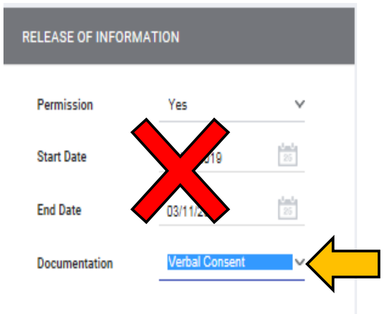
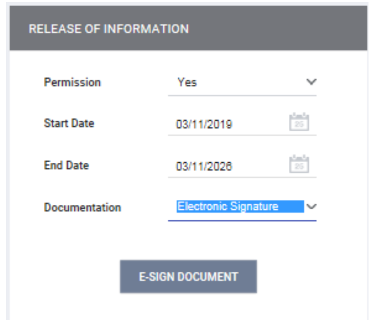
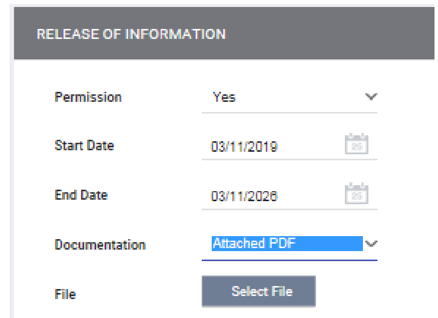
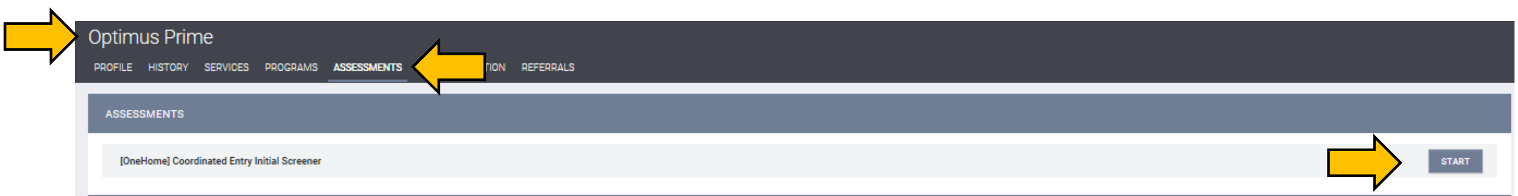
Step 3 NOTE 2: There are 4 drop-down options available for the ROI. You can attach a PDF of the ROI, do an electronic signature or have a signed paper document. Verbal Consent for the ROI is NOT AN ACCEPTABLE ROI collection type. Any record with a 'Verbal Consent' ROI will not be considered for housing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





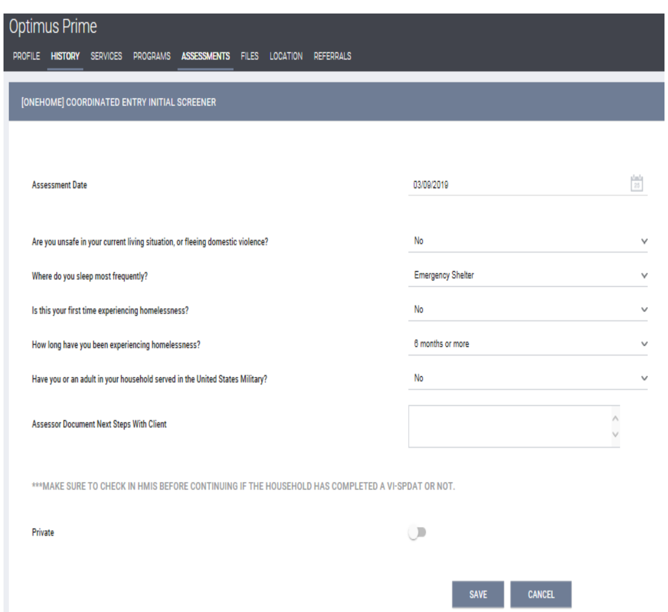


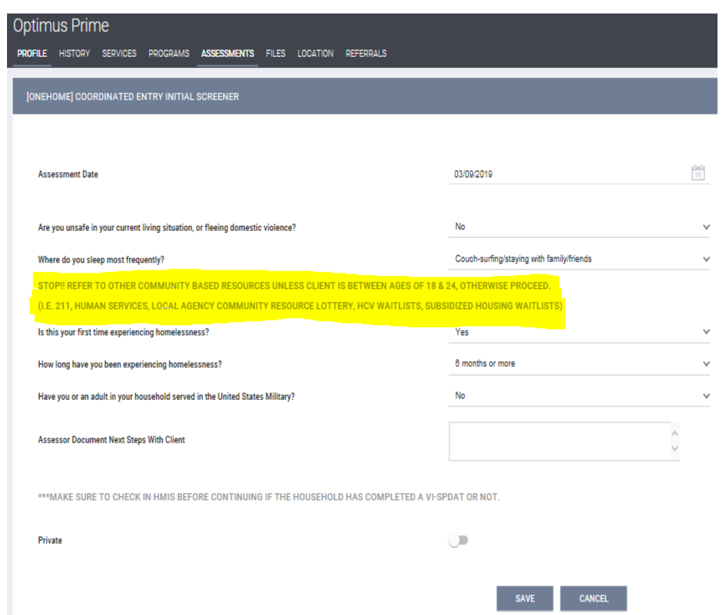
Step 4: Once you have successfully entered the new client, select the assessment tab at the top of the page once you are inside the client profile. You will know if you are in the client profile because the client's name will appear in the top left hand corner of the page. In the Assessment Tab you will 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.





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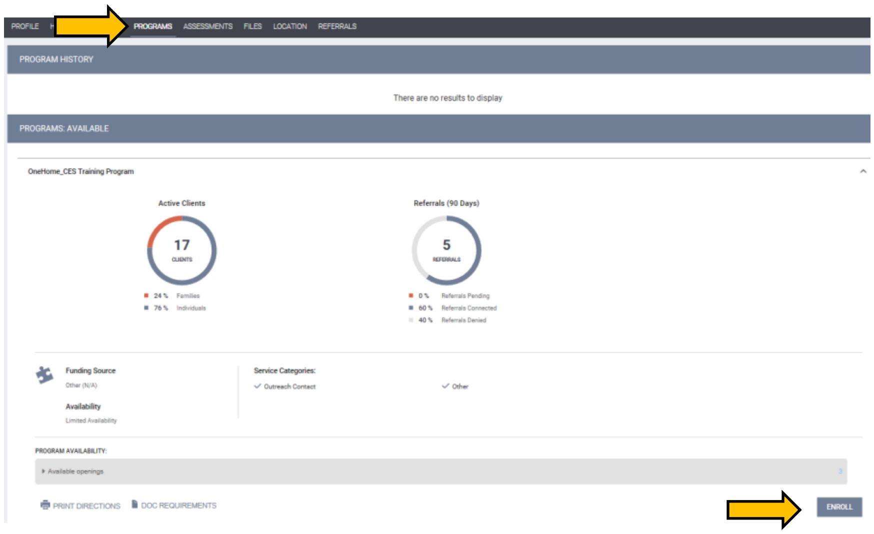
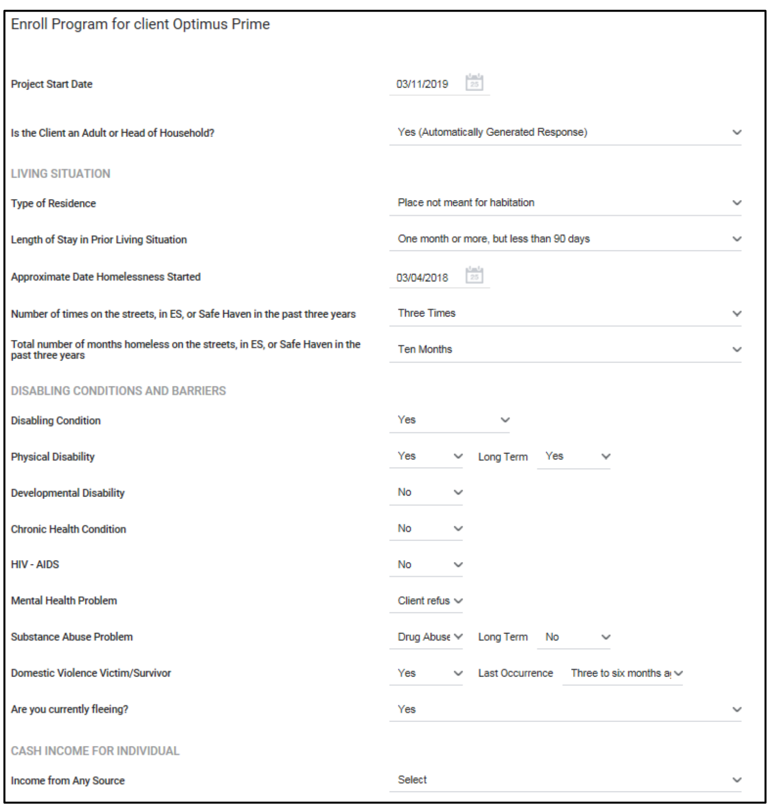
ENROLL INTO COORDINATED ENTRY PROGRAM

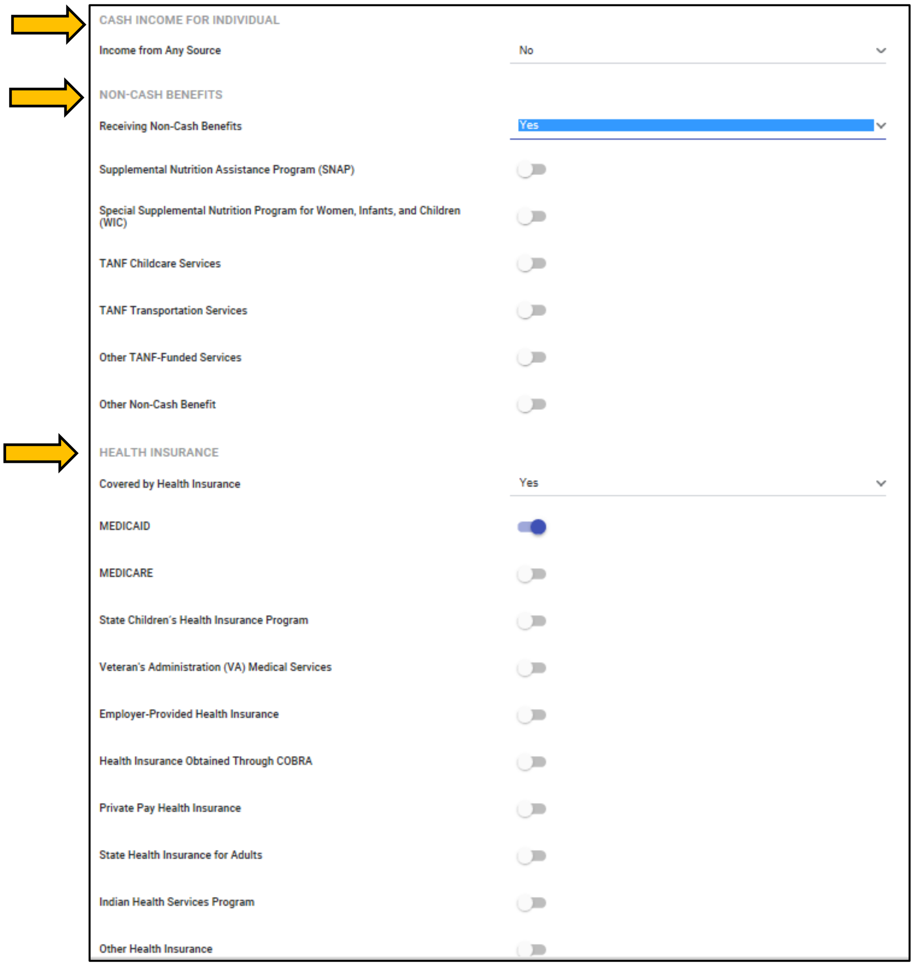
Step 6: If a VI-SPDAT is recommended, the first thing you need to do is enroll them in the Coordinated Entry program. Select the Programs Tab and enroll the client into the OneHome coordinated entry program by selecting the enroll button at the bottom of the page.



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'.

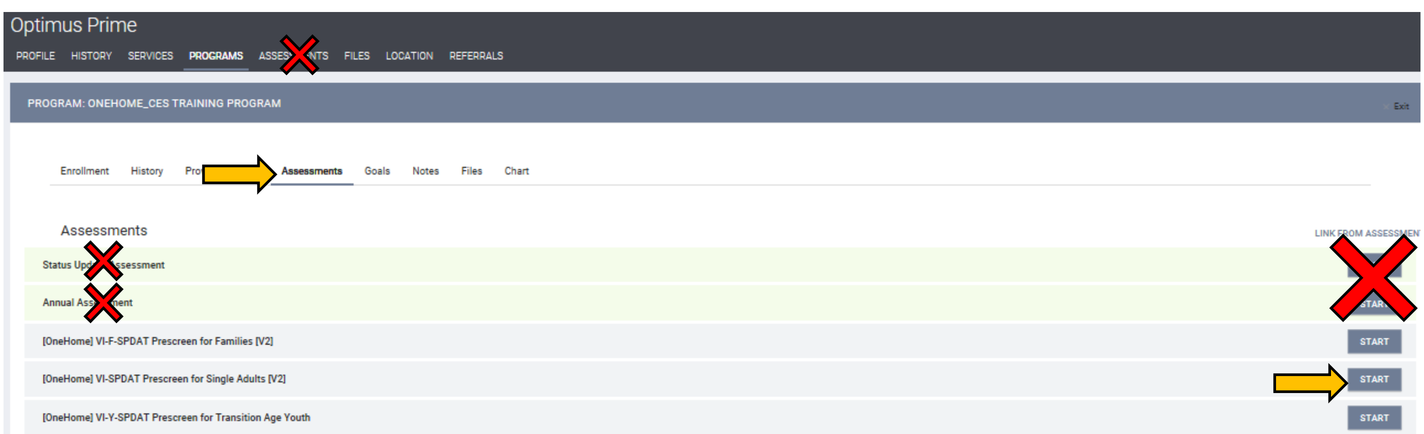




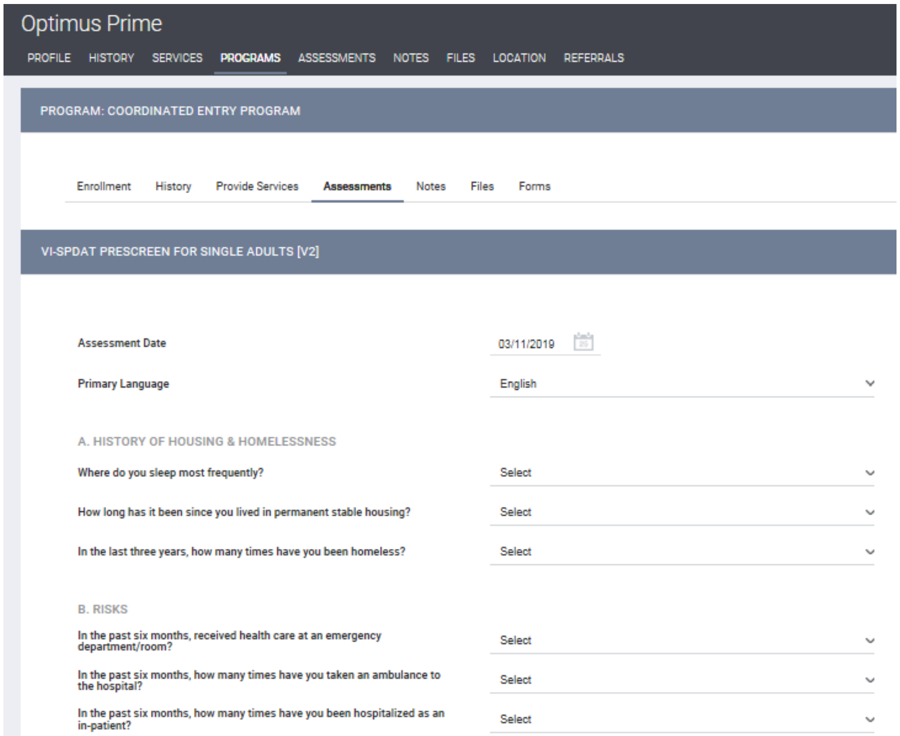
VI-SPDAT ASSESSMENT

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

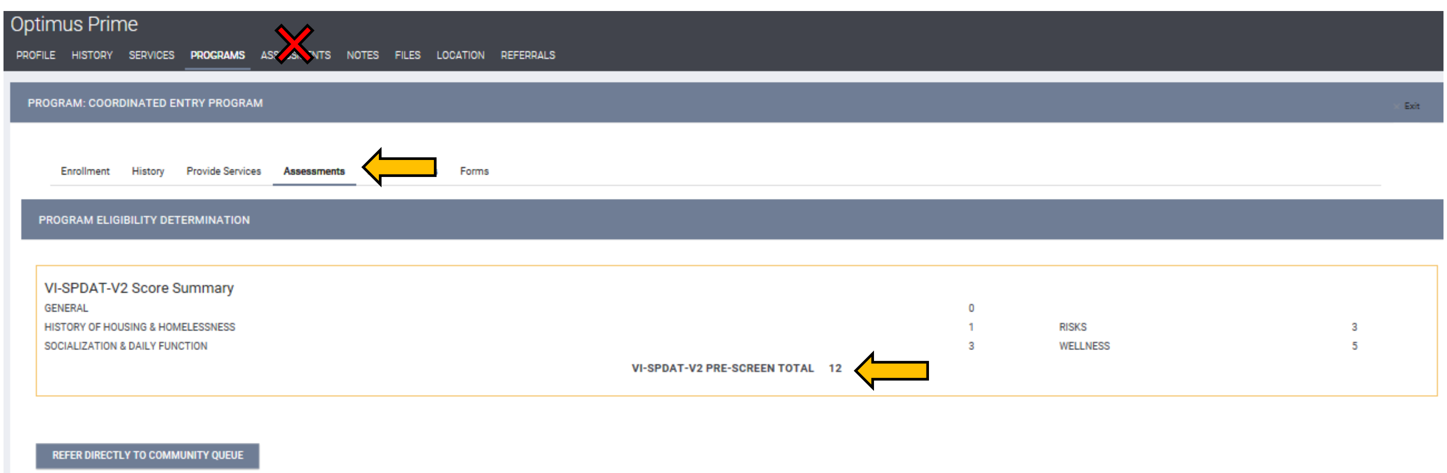


Step 9: Once you enter the assessment, the screen should look like this:



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 Eligibilty 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



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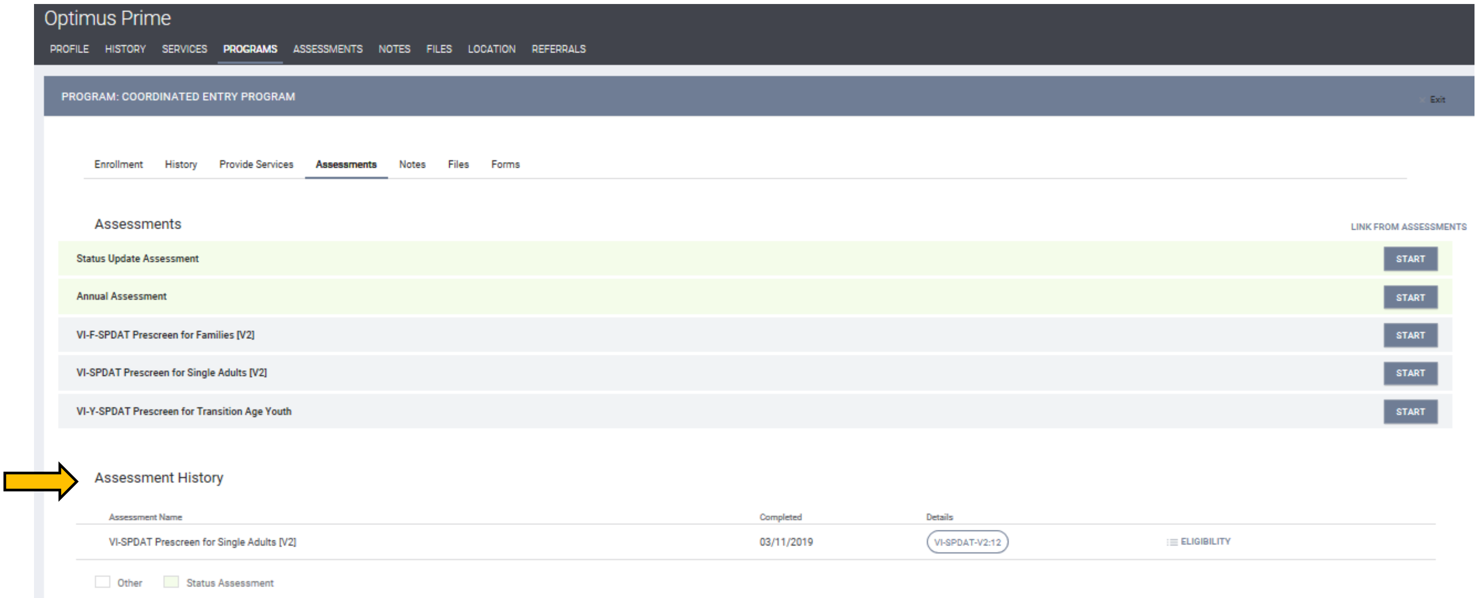
Housing Eligibility and Preferences

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.

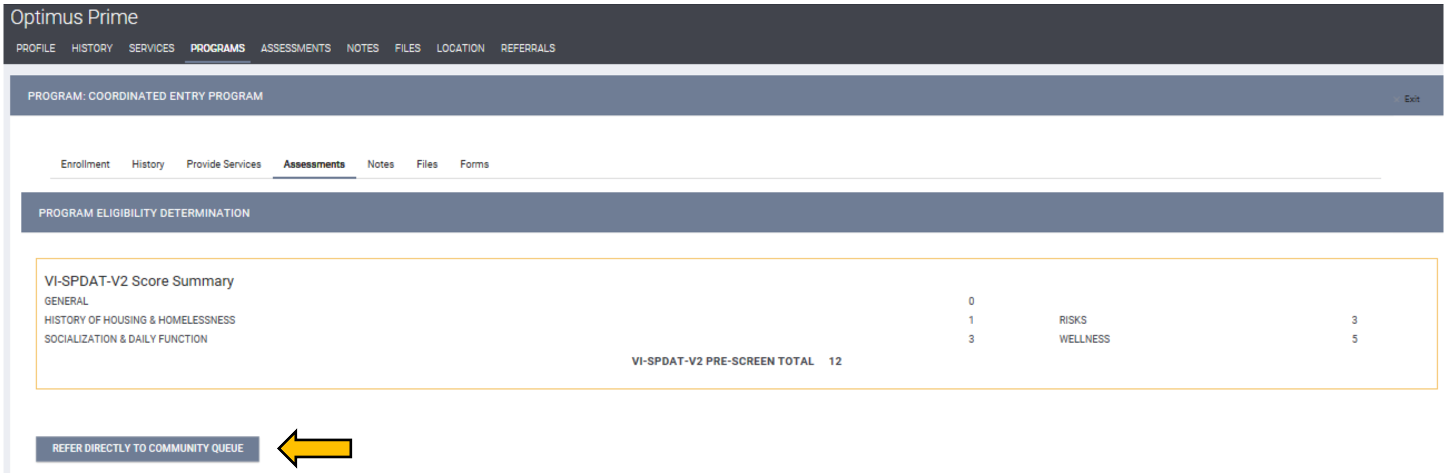


Step 12: Now, you can scroll to the bottom of your completed survey and switch on the Housing Eligibility and Preferences Questions.

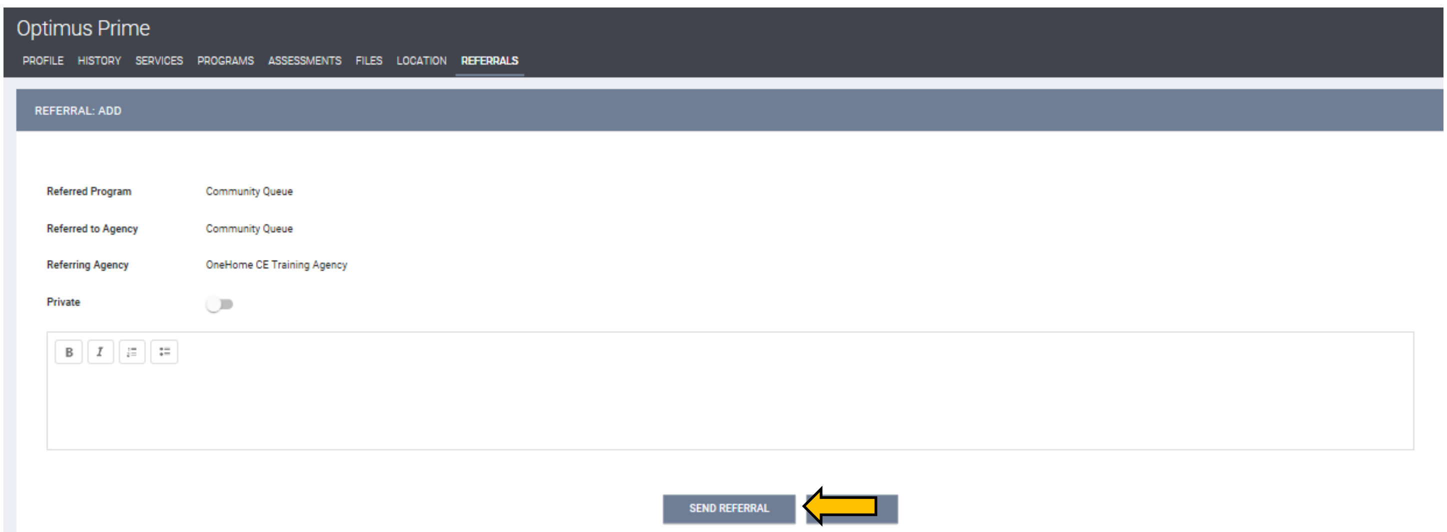
When you click the toggle, more questions will appear. Once you have completed all questions, click save again.

REFERRING TO THE COMMUNITY QUEUE:

Step 13: Once the VI-SPDAT Assessment AND Housing Eligibilty 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.



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.



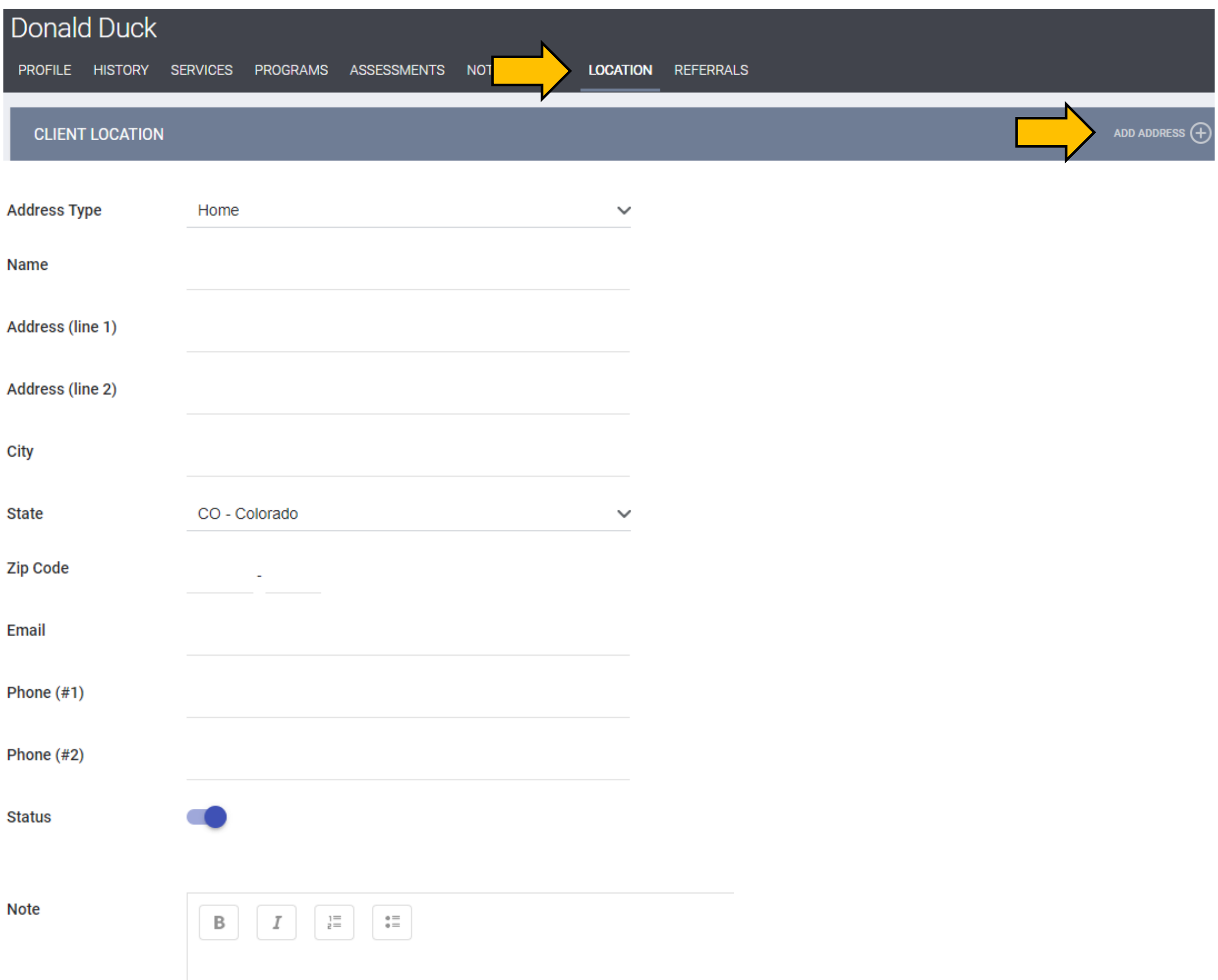
HMIS Client Contact Information – Form & Instructions

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:

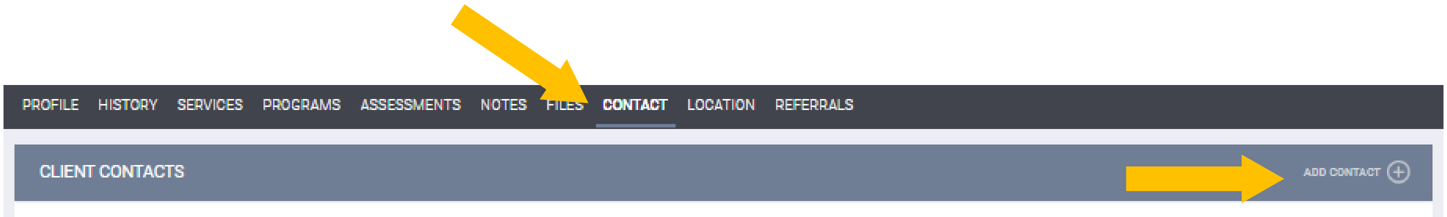
- **Address Type:** Home = client info. Other selections include: Work, Mailing, Emergency, Mother, Father, Spouse, Other, Message, Emergency Shelter and more.
- Name = Client (if Home) or other person if this is another person's contact info to get ahold of client
- Fill out info that you have, but 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



HMIS Client Contact Information – Form & Instructions

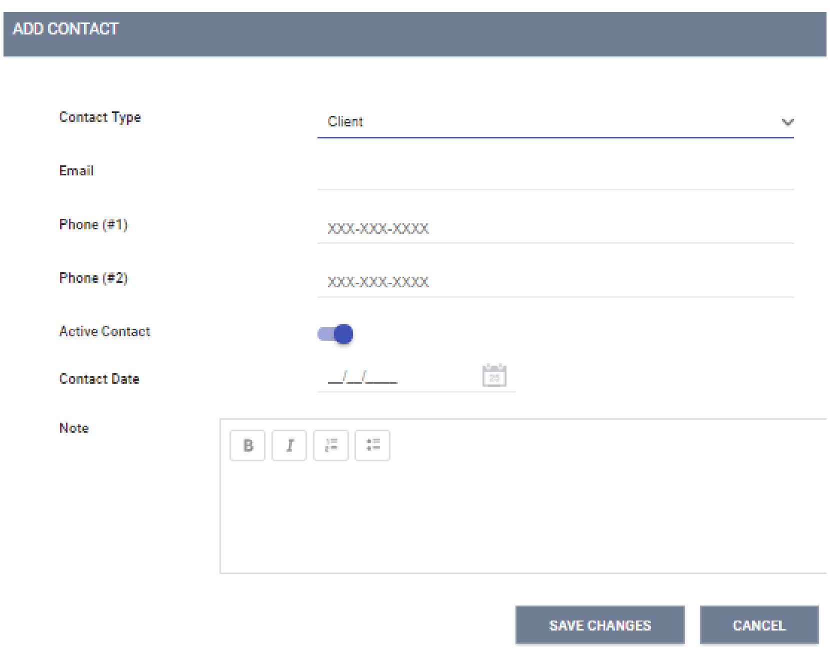
Date: M/DD/YYYY _____________ Client Name: ___________________

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



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): ____