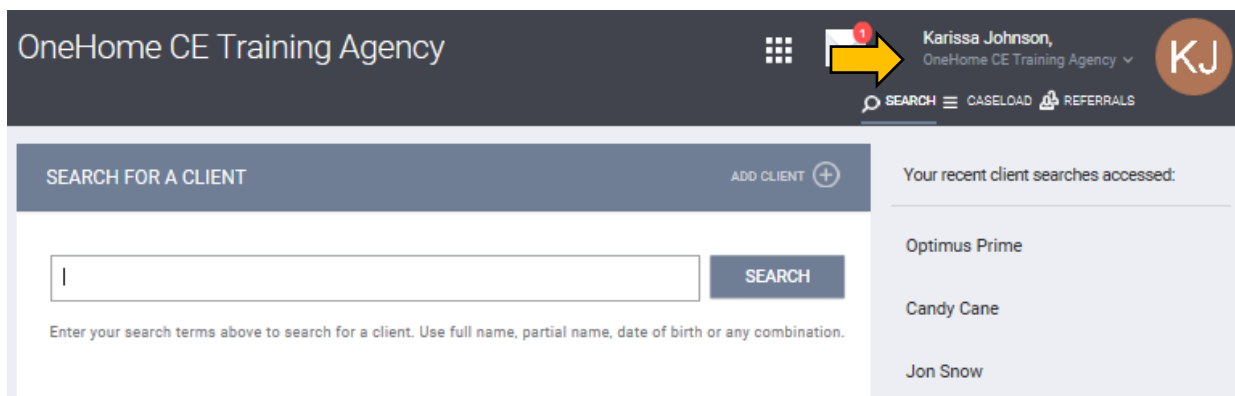


OneHome Assessor Process Guide

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.



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: Select

Last Name: _____

First Name: _____

Quality of Name: Select

Quality of DOB: Select

Date of Birth: ____/____/____

Middle Name: _____ None

Alias: _____

OneHome Salesforce ROI:

Gender: Select

Race: Select

Ethnicity: Select

RELEASE OF INFORMATION

Permission: Yes

Start Date: 03/11/2019

End Date: 03/11/2026

Documentation: Select

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: Yes

VETERAN INFORMATION

Year Entered Military Service (Year): _____ Separated (Year): _____

Theater of Operations: World War II: Select

Theater of Operations: Korean War: Select

Theater of Operations: Vietnam War: Select

Theater of Operations: Persian Gulf War: Select

Theater of Operations: Afghanistan: Select

Theater of Operations: Iraq (Iraqi Freedom): Select

Theater of Operations: Iraq (New Dawn): Select

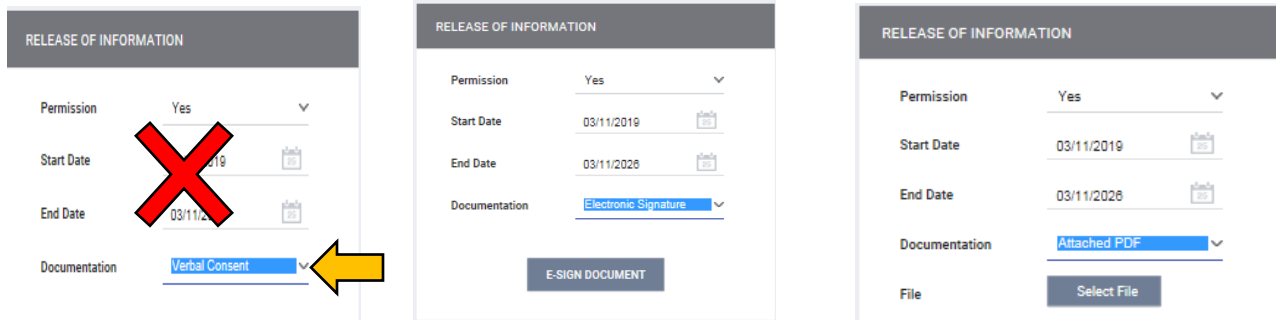
Theater of Operations: Other Operations: Select

Branch of Military: Select

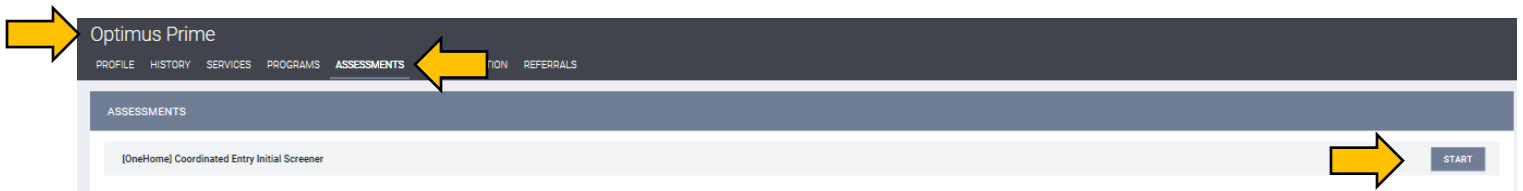
Discharge Status: Select

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.

Optimus Prime

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS FILES LOCATION REFERRALS

[ONEHOME] COORDINATED ENTRY INITIAL SCREENER

Assessment Date: 03/09/2019

Are you unsafe in your current living situation, or fleeing domestic violence? No

Where do you sleep most frequently? Emergency Shelter

Is this your first time experiencing homelessness? No

How long have you been experiencing homelessness? 6 months or more

Have you or an adult in your household served in the United States Military? No

Assessor Document Next Steps With Client

***MAKE SURE TO CHECK IN HMIS BEFORE CONTINUING IF THE HOUSEHOLD HAS COMPLETED A VI-SPDAT OR NOT.

Private

SAVE CANCEL

Optimus Prime

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS FILES LOCATION REFERRALS

[ONEHOME] COORDINATED ENTRY INITIAL SCREENER

Assessment Date: 03/09/2019

Are you unsafe in your current living situation, or fleeing domestic violence? No

Where do you sleep most frequently? Couch-surfing/staying with family/friends

STOP! REFER TO OTHER COMMUNITY BASED RESOURCES UNLESS CLIENT IS BETWEEN AGES OF 18 & 24, OTHERWISE PROCEED (I.E. 211, HUMAN SERVICES, LOCAL AGENCY COMMUNITY RESOURCE LOTTERY, HCY WAITLISTS, SUBSIDIZED HOUSING WAITLISTS)

Is this your first time experiencing homelessness? Yes

How long have you been experiencing homelessness? 6 months or more

Have you or an adult in your household served in the United States Military? No

Assessor Document Next Steps With Client

***MAKE SURE TO CHECK IN HMIS BEFORE CONTINUING IF THE HOUSEHOLD HAS COMPLETED A VI-SPDAT OR NOT.

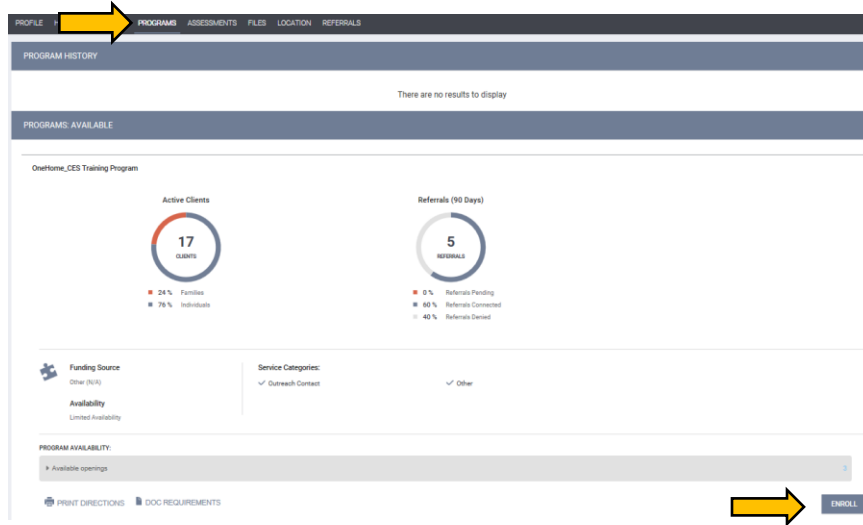
Private

SAVE CANCEL

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 <small>Print</small>
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) <small>▼</small>
LIVING SITUATION	
Type of Residence	Place not meant for habitation <small>▼</small>
Length of Stay in Prior Living Situation	One month or more, but less than 90 days <small>▼</small>
Approximate Date Homelessness Started	03/04/2018 <small>Print</small>
Number of times on the streets, in ES, or Safe Haven in the past three years	Three Times <small>▼</small>
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Ten Months <small>▼</small>
DISABLING CONDITIONS AND BARRIERS	
Disabling Condition	Yes <small>▼</small>
Physical Disability	Yes <small>▼</small> Long Term Yes <small>▼</small>
Developmental Disability	No <small>▼</small>
Chronic Health Condition	No <small>▼</small>
HIV - AIDS	No <small>▼</small>
Mental Health Problem	Client refus <small>▼</small>
Substance Abuse Problem	Drug Abuse <small>▼</small> Long Term No <small>▼</small>
Domestic Violence Victim/Survivor	Yes <small>▼</small> Last Occurrence Three to six months a <small>▼</small>
Are you currently fleeing?	Yes <small>▼</small>
CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Select <small>▼</small>

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

Assessment Name	Action
Status Update Assessment	START
Annual Assessment	START
[OneHome] VI-F-SPDAT Prescreen for Families [V2]	START
[OneHome] VI-SPDAT Prescreen for Single Adults [V2]	START
[OneHome] VI-Y-SPDAT Prescreen for Transition Age Youth	START

OneHome Assessor Process Guide

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

The screenshot shows the Optimus Prime interface for a 'COORDINATED ENTRY PROGRAM'. The 'ASSESSMENTS' tab is selected. The assessment is titled 'VI-SPDAT PRESCREEN FOR SINGLE ADULTS [v2]'. It includes fields for 'Assessment Date' (03/11/2019) and 'Primary Language' (English). Below are sections A and B, each with several questions that have 'Select' dropdown menus.

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

The screenshot shows the 'PROGRAM ELIGIBILITY DETERMINATION' screen. The 'ASSESSMENTS' tab is highlighted with a red 'X' and a yellow arrow. The 'VI-SPDAT-V2 Score Summary' is displayed, showing scores for GENERAL (0), HISTORY OF HOUSING & HOMELESSNESS (1), SOCIALIZATION & DAILY FUNCTION (3), RISKS (3), and WELLNESS (5). The total score is 12, indicated by a yellow arrow. A button at the bottom says 'REFER DIRECTLY TO COMMUNITY QUEUE'.

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

REFER DIRECTLY TO COMMUNITY QUEUE

OneHome Assessor Process Guide

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

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

Assessments LINK FROM ASSESSMENTS

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

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? Select

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 Bedrooms 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)? Select

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

OneHome Assessor Process Guide

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.

The screenshot shows the Optimus Prime interface. At the top, there is a navigation bar with 'Optimus Prime' and menu items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION, REFERRALS. Below this is a header for 'PROGRAM: COORDINATED ENTRY PROGRAM' with an 'Exit' link. A sub-header shows 'Enrollment History Provide Services Assessments Notes Files Forms'. The main content area is titled 'PROGRAM ELIGIBILITY DETERMINATION' and contains a 'VI-SPDAT-V2 Score Summary' table. The table has columns for 'GENERAL', 'HISTORY OF HOUSING & HOMELESSNESS', 'SOCIALIZATION & DAILY FUNCTION', 'RISKS', and 'WELLNESS'. The scores are: GENERAL (0), HISTORY OF HOUSING & HOMELESSNESS (1), SOCIALIZATION & DAILY FUNCTION (3), RISKS (3), and WELLNESS (5). The total score is 12. Below the table is a button labeled 'REFER DIRECTLY TO COMMUNITY QUEUE' with a yellow arrow pointing to it.

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

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.

The screenshot shows the Optimus Prime interface for 'REFERRAL: ADD'. The navigation bar includes 'Optimus Prime' and menu items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, FILES, LOCATION, REFERRALS. The form fields are: 'Referred Program' (Community Queue), 'Referred to Agency' (Community Queue), 'Referring Agency' (OneHome CE Training Agency), and 'Private' (toggle switch). Below the form is a text area with a rich text editor toolbar. At the bottom, there is a button labeled 'SEND REFERRAL' with a yellow arrow pointing to it.

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 NOT 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

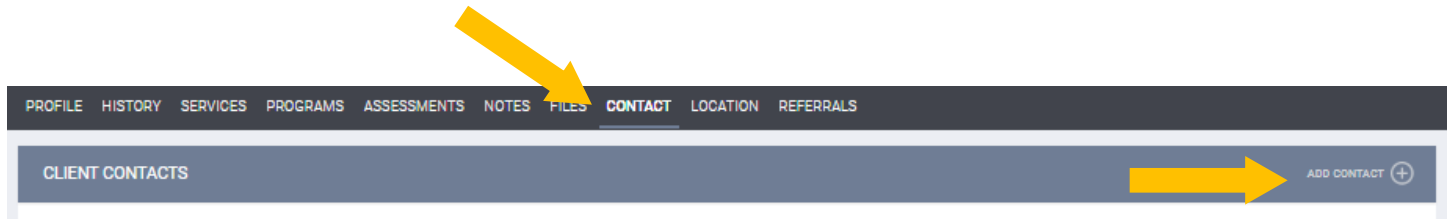
-
- 1.

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

A screenshot of the 'ADD CONTACT' form. The form is titled 'ADD CONTACT' in a dark blue header. Below the header, there are several input fields: 'Contact Type' is a dropdown menu with 'Client' selected; 'Email' is a text input field; 'Phone (#1)' and 'Phone (#2)' are text input fields with a placeholder 'XXX-XXX-XXXX'; 'Active Contact' is a toggle switch that is currently turned on; 'Contact Date' is a date input field with a calendar icon; and 'Note' is a rich text editor with a toolbar containing buttons for Bold (B), Italic (I), Bulleted List, and Numbered List. At the bottom of the form, there are two buttons: 'SAVE CHANGES' and '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): _____