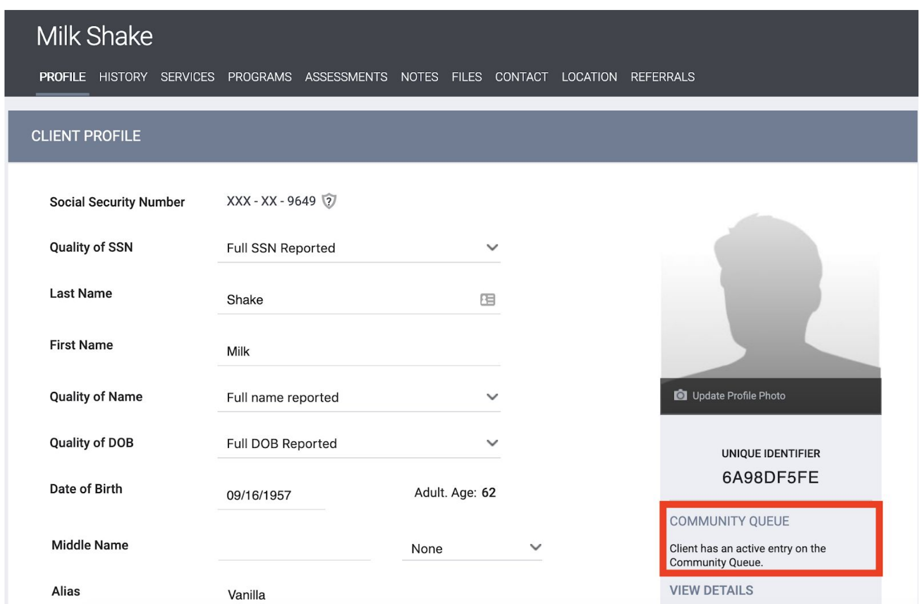
Access Partner Tip Sheet

How do I see if a client is housing referral status?

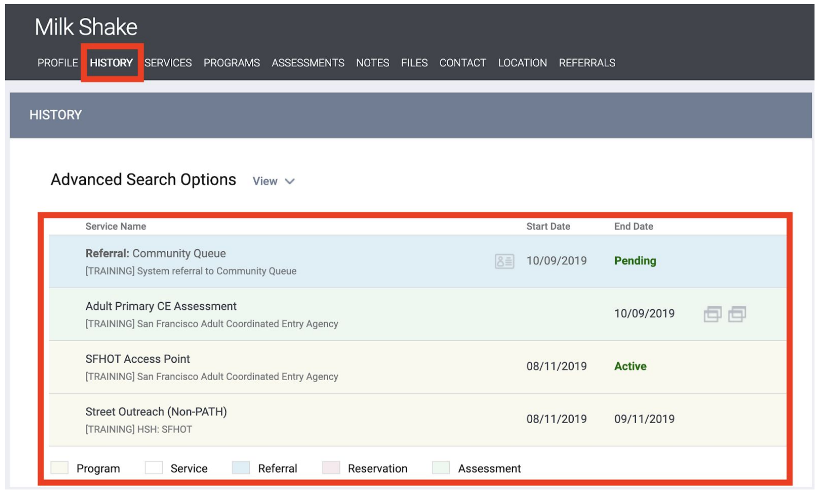
1. Search for client in the ONE System

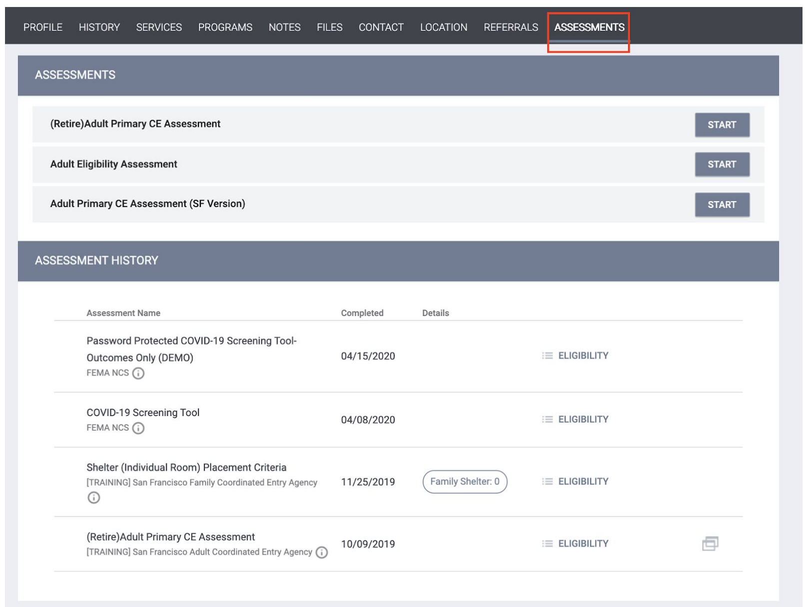
2. Access client profile. You can see if a client is Housing Referral Status by looking under the Unique Identifier Number. Clients who are Housing Referral Status will say " Client has an active entry on the Community Queue".



How do I find if a client has been assessed?

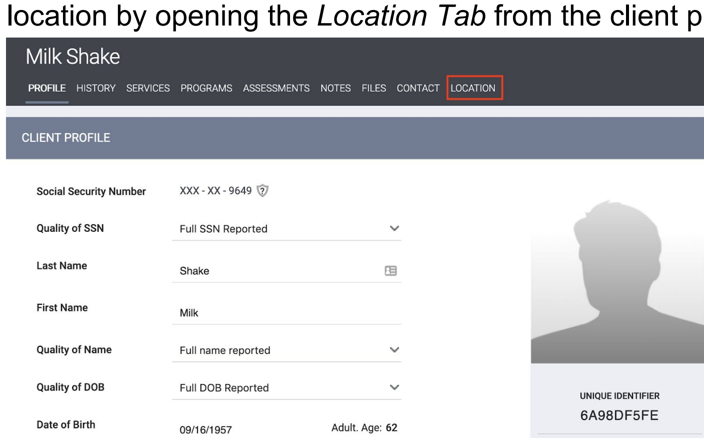
1. To see if a client has been assessed, look in the client's *History Tab* or *Assessment Tab.*



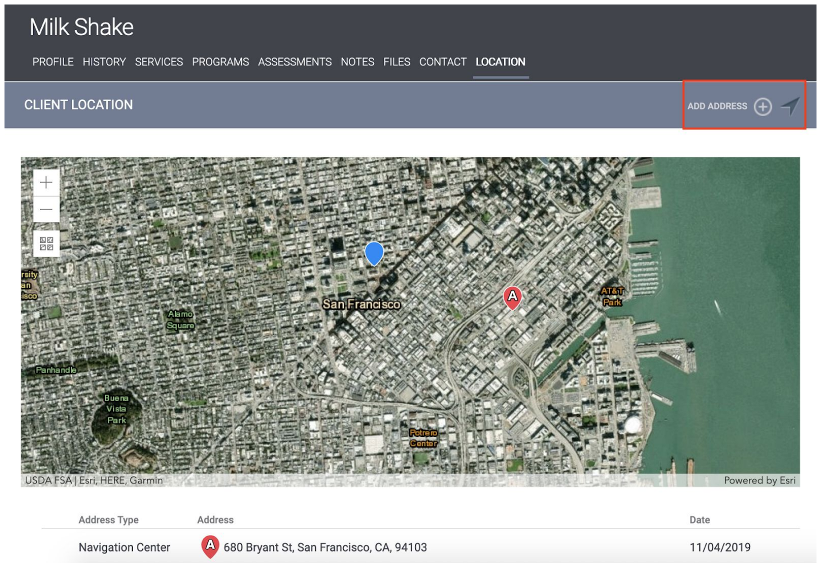


How do I add or search for client location?

1. Access a client's location by opening the *Location Tab* from the client profile.

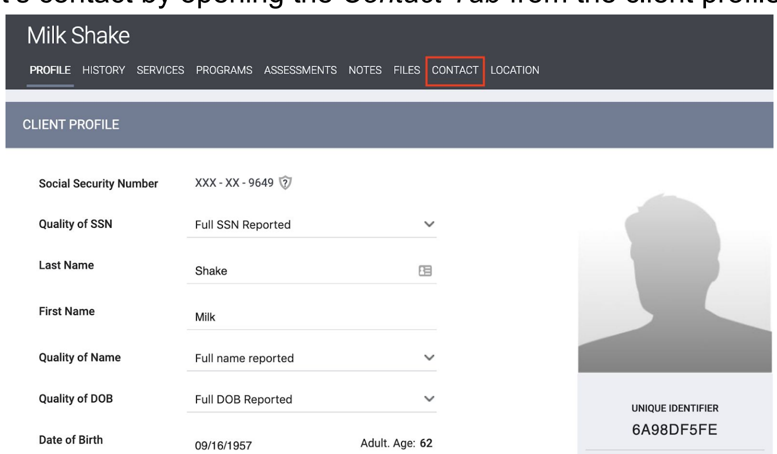


2. You can see a list of client's locations and also add a new location if there is an update. Fun Fact: You can drop a pin on the map for geolocation service.

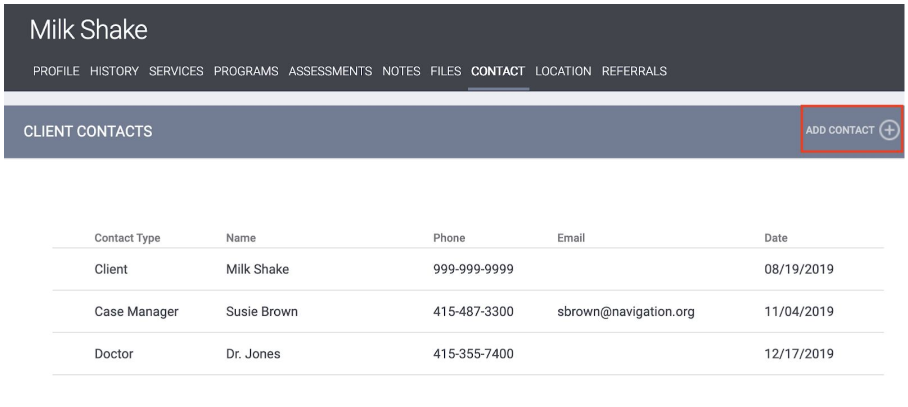


How do I add or search for client contact information?

1. Access a client's contact by opening the *Contact Tab* from the client profile.

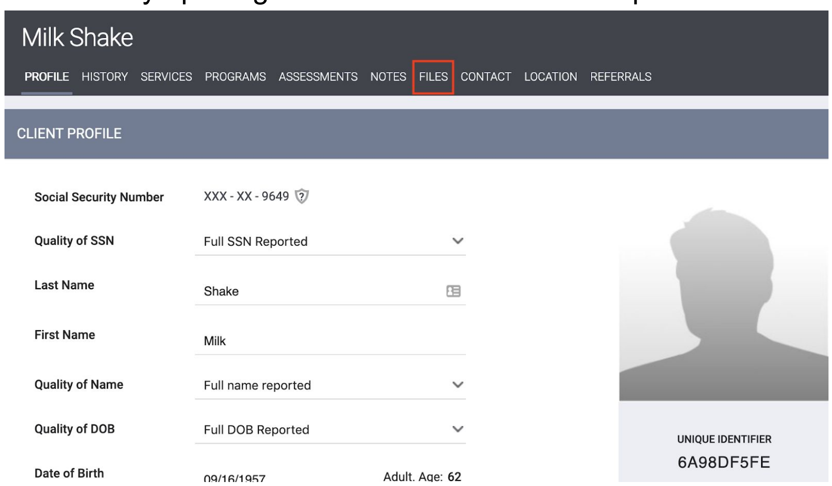


2. You can see a list of client's contacts and also add new contact information if there is a change or update. It is especially useful to include contact information for case managers, social workers, doctors, and other members of the client's community provider team.



How do I add or search for client file documentation?

1. Access a client's files by opening the *File Tab* from the client profile.



2. You can see a list of uploaded files such as government issued identification and proof of income. You can add a file by clicking on *Add File.* Print by entering CTRL P or Command P.