



Access Partner Tip Sheet

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

1. Search for client in the ONE System

SEARCH FOR A CLIENT			ADD CLIENT (+)
milk shake			SEARCH
Milk Shake (Vanilla)	09/16/1957	9649	

Managed with Clarity Human Services

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".

Milk Shake

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

CLIENT PROFILE

Social Security Number	XXX - XX - 9649	
Quality of SSN	Full SSN Reported	
Last Name	Shake	
First Name	Milk	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	09/16/1957	Adult. Age: 62
Middle Name	None	
Alias	Vanilla	

Update Profile Photo

UNIQUE IDENTIFIER
6A98DF5FE

COMMUNITY QUEUE
Client has an active entry on the Community Queue.

VIEW DETAILS

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*.

Milk Shake

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

HISTORY

Advanced Search Options View ▾

Service Name	Start Date	End Date
Referral: Community Queue [TRAINING] System referral to Community Queue	10/09/2019	Pending
Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency		10/09/2019
SFHOT Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	08/11/2019	Active
Street Outreach (Non-PATH) [TRAINING] HSH: SFHOT	08/11/2019	09/11/2019

Program
 Service
 Referral
 Reservation
 Assessment

PROFILE HISTORY SERVICES PROGRAMS NOTES FILES CONTACT LOCATION REFERRALS ASSESSMENTS

ASSESSMENTS

(Retire)Adult Primary CE Assessment START

Adult Eligibility Assessment START

Adult Primary CE Assessment (SF Version) START

ASSESSMENT HISTORY

Assessment Name	Completed	Details
Password Protected COVID-19 Screening Tool- Outcomes Only (DEMO) FEMA NCS	04/15/2020	ELIGIBILITY
COVID-19 Screening Tool FEMA NCS	04/08/2020	ELIGIBILITY
Shelter (Individual Room) Placement Criteria [TRAINING] San Francisco Family Coordinated Entry Agency	11/25/2019	Family Shelter: 0 ELIGIBILITY
(Retire)Adult Primary CE Assessment [TRAINING] San Francisco Adult Coordinated Entry Agency	10/09/2019	ELIGIBILITY

Managed with Clarify Human Services Recover deleted data

How do I add or search for client location?


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

Milk Shake

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION

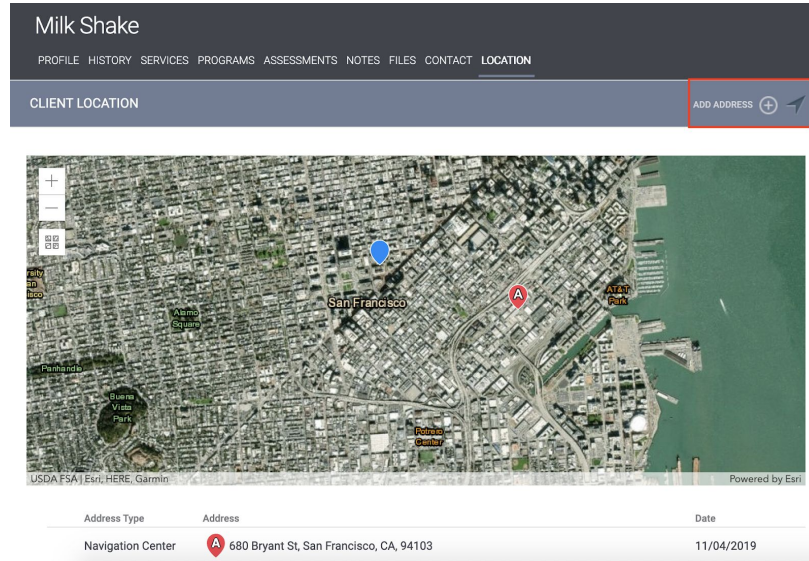
CLIENT PROFILE

Social Security Number	XXX - XX - 9649
Quality of SSN	Full SSN Reported
Last Name	Shake
First Name	Milk
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	09/16/1957 Adult. Age: 62



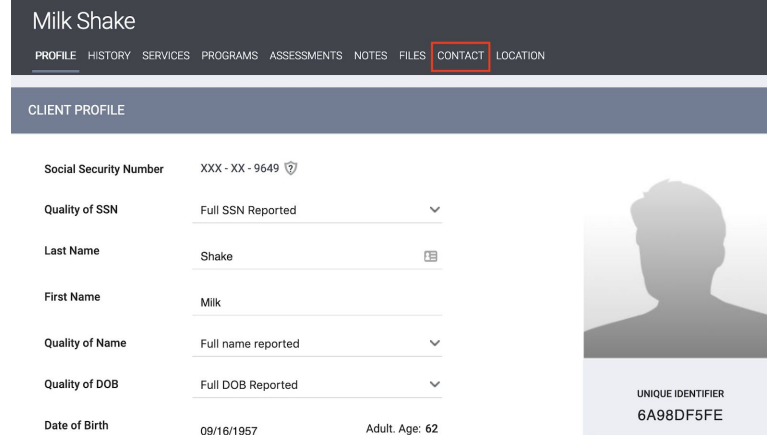
UNIQUE IDENTIFIER
6A98DF5FE

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.

