



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

Milk Shake (Vanilla) 09/16/1957 9649

SEARCH

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 Clarix 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.

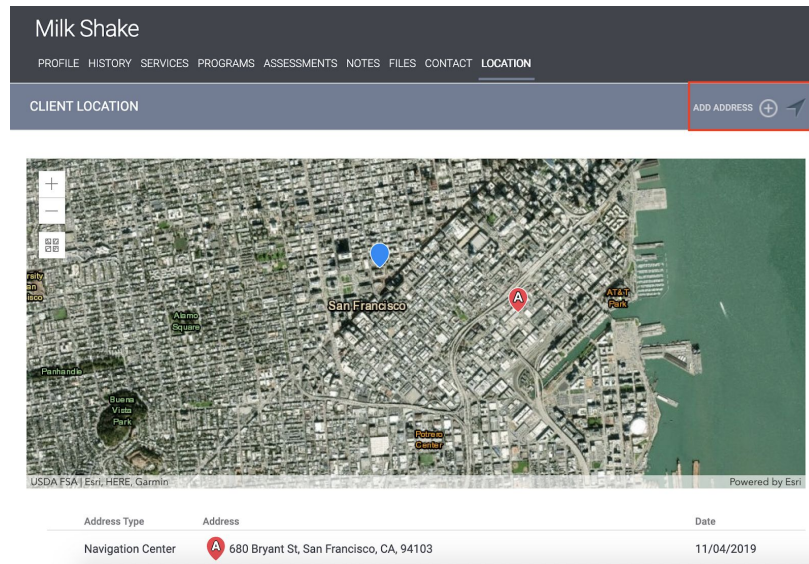
Milk Shake
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION

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

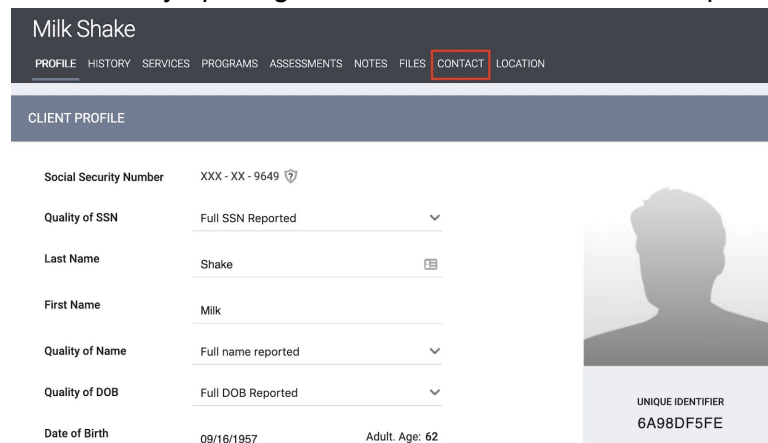
UNIQUE IDENTIFIER
6A98DF5FE

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.

Milk Shake				
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS				
CLIENT CONTACTS				
				ADD CONTACT +
Contact Type	Name	Phone	Email	Date
Client	Milk Shake	999-999-9999		08/19/2019
Case Manager	Susie Brown	415-487-3300	sbrown@navigation.org	11/04/2019
Doctor	Dr. Jones	415-355-7400		12/17/2019

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.

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

UNIQUE IDENTIFIER
6A98DF5FE

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.

Milk Shake	
PROFILE	HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS
CLIENT FILES	
	ADD FILE +
	Personal Identification:Government Issues Identification by DPH Test on 19 Aug, 2019, 14.57 KIB [TRAINING] System MODIFY FILE DELETE FILE
	Finances and Income:Social Security Benefit Check by Ja Guerrero Huh on 23 Dec, 2019, 579.68 KIB [TRAINING] System MODIFY FILE DELETE FILE