



Metro Denver Homeless Initiative |  
Conlan Consulting |

# Salesforce Community for Coordinated Housing Entry

# Legacy Systems

- Multiple Legacy Systems
  1. Spreadsheets
  2. Retired
- Reporting Limitations
- Inefficient process to gather signed Release of Information forms
- Lacking search functionality
- Duplicated records

# Technical Requirements

- Single Secure database, Internet or Cloud Based, HIPAA compliant, credentials based access
- Multiple Levels of Profile Permission Access
- Ability to enter VI-SPDAT assessment data (3 versions: Individual, Family, Youth), calculate and store score, to be displayed and reportable
- Release of Information Form Tracking
- Client Priority Tracking
- Client Status Tracking: Active/Inactive
- Housed Tracking
- VA Eligibility Tracking
- Notes/Updates tracking: this field would allow for free form notes for updates about a client, should allow for entry & time stamp for multiple/ongoing entries within this field.
- Reporting capability (at least ability to access the tables & report)
- Export/Import capabilities
- Ability to look up clients – see if surveys completed (avoid duplication) & score (All Users)
- Ability for agency users to put in updates about clients
- Accessible by Veterans' Administration staff
- Ability to upload documents (ROIs, BC, SSN, IDs, etc)
- [Optional] Digital releases of information (displayed on computer/pad, signed with mouse/stylus/finger)

# Solution

- Salesforce Community accessible by Agencies' Caseworkers
- Embedded forms via Formstack's HIPAA-compliant managed package
- Custom Object & Data Model
  1. Clients
  2. Assessments
  3. Housing Forms
  4. Programs
- Process Builder Automation
- Custom Profiles & Permission Sets
- Tiered Licensing (Salesforce EE, Community Plus, Community)
- Training Sandbox

# Results

- Fulfilled all technical requirements
- Met budgetary constraints
- Single system for Coordinated Entry; HUD mandated
- Reduced time to house clients
- Agency self-reporting capabilities
- Veteran providers can cross-reference with VA system to ensure veteran clients are receiving necessary services

# Preview

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MDHI OneHome Assessment Community

Search...

Search

Clients

New Client

Family Assessment

Individual Assessment

Youth Assessment

Housing Vacancy

Housing Referral Outcome

Client

Donald "Donny" Duck

Printable View

Back to List: Clients

Notes (2) | Assessments (1) | Client History (5)

Client Detail

Edit

Upload Documentation

First Name

Donald "Donny"

Last Name

Duck

Client Full Name

Donald "Donny" Duck

Birthdate

1/31/1970

Age

48

Social Security #

\*\*\*-\*\*-5555

# Months Homeless as of Today

21

HMS ID

Most Recent VI-SPDAT Data

Survey Date

1/10/2018

# Months Homeless at Assessment

18

VI-SPDAT Score

11

Tri-Morbid

VI-SPDAT Type

Individual

Literally Homeless

Interviewer Name

Renee Crews

Chronically Homeless

Agency

Denver's Road Home

VI-SPDAT IND v1 Score

Client Contact Info

Easiest Time of Day to Find

Afternoon

Client Phone

(720) 123-9876

Easiest Place to Find

Civic Center park

Client Email

dduck@gmail.com

Social Media Account

Contact info for Friend/Family or Case Manager/Outreach Worker

Family/Friend Name

Daffy Duck

Case Manager/Outreach Worker Name

Joe Schmo

Family/Friend Phone

Case Manager/Outreach Worker Phone

123-7879

Family/Friend Email

daffy.duck@gmail.com

Case Manager/Outreach Worker Email

Release Info

Release Date

4/1/2018

Release Type

Extended (After 7/1/2017)

Release Expiration Date

Veteran Info

Veteran

BNL Status

Active - Street

VA Eligibility

BNL Inactive Date

GPD Status

Tracking Info

Client Status

Active

Priority Tracking

Prematch

Documentation on File

Release of Information (ROI); Drivers LicenseID; Social Security Card; Birth Certificate; Homeless Documentation

Date Referred

2/6/2018

Other Documentation

Pre-Match Date

Priority Resource Type

Veteran

Housing Info

Housing Program

City Housed In

Move-in Date

County Housed In

Edit

Upload Documentation

Notes

New Note

Action

Subject

Body

Created Date

Edit

Housed

Donald Duck moved in with Daisy.

4/4/2018

Edit

RMHS Program Enrolled

Client enrolled in RMHS progrm

2/6/2018

Assessments

Action

Client Assessment Code

Record Type

Survey Date & Time

Interviewer

Interviewer Agency

Created Date

Assess-0000000558

Individual

1/11/2018 12:00 AM

Renee Crews

Denver's Road Home

1/23/2018

Client History

Date

User

Action

4/4/2018 10:10 AM

Renee Crews

Changed Release Date from 2/16/2018 to 4/1/2018.

4/3/2018 4:20 PM

Renee Crews

Changed Client Status from Inactive to Active.

4/3/2018 4:19 PM

Renee Crews

Changed Client Status from Active to Inactive.

4/2/2018 3:31 PM

Renee Crews

Changed BNL Status from Inactive - Incarcerated to Active - Street.

4/2/2018 3:31 PM

Renee Crews

Changed Client Status from Deceased to Active.

Show more > | Go to list >

Back To Top

Always show me more records per related list

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ASSESSMENTS

OVERVIEW

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OneHome is a collaboration between many solutions for persons experiencing homelessness.

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Password

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MDHI OneHome Assessment Community

Search...

Search

Clients

New Client

Family Assessment

Individual Assessment

Youth Assessment

Housing Vacancy

Housing Referral Outcome

Contacts

Reports

New Client Details

First Name\*

Last Name\*

Social Security #\*

Birthdate\*

Release of Information (ROI)

Please upload a Release of Information (ROI)\*

Add File...

Release Date\*

Release Expiration Date

VI-SPDAT Individual Assessment

Interviewer\*

Interviewer Agency\*

Submitted By\*

Survey Date & Time\*

County where Interview was Completed\*

Survey Location\*

Client Consent to Participate\*

Client Info

Client\*

Gender\*

Verizon

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visualantidoteforce.com

Home

Formstack

Submission Dashboard

Clients

Assessments

Housing Forms

Housing Vacancy

Create New Form

Sort order: Last Modified

Family

Primary Object: Assessment

Form active

Last modified on: 28/03/2018

Submissions

Publish Options

Housing Referral Outcomes Form

Primary Object: Housing Form

Form active

Last modified on: 28/03/2018

Submissions

Publish Options

Client Documentation Upload

Primary Object: Client

Form active

Last modified on: 25/01/2018

Submissions

Publish Options

Youth

Primary Object: Assessment

Form active

Last modified on: 25/01/2018

Submissions

Publish Options

New Client

Primary Object: Client

Form active

Last modified on: 25/01/2018

Submissions

Publish Options

# Questions?

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