



## Individual Residential Services & Supports (IRSS) Inspections Program Salesforce Application Walkthrough

In your browser, navigate to: <https://socgov17.force.com/IRSS/s/login>

Enter your login credentials and click the “Log In” button. This will take you to a screen that displays all the settings associated to your PASA.

### Home Screen:

NUMBER	SETTING ADDRESS	SETTING STRUCTURE ...	TYPE	CREATED DATE
A-00266	555 Pearl Street Denver ...	Townhome	HHP	5/6/21, 11:46 AM
A-00080	2000 Broadway Denver 8...	Townhome	HHP	4/29/21, 4:57 PM
A-00071	754 Finch Street Denver ...	Single Family Home	HHP	4/28/21, 9:51 AM
A-00048	987 Baseline Street Bould...	Apartment	HHP	4/27/21, 11:03 AM
A-00042	616 Lincoln Street Denve...	Single Family Home	POL	4/27/21, 10:27 AM
A-00033	9899 43rd 1/2 Street Mo...	Other	HHP	4/22/21, 2:25 PM
A-00027	6564 Ogden Street Adam...	Apartment	HHP	4/22/21, 2:19 PM
A-00016	8484 Broadway Street EI ...	Single Family Home	HHP	4/22/21, 12:35 PM
A-00009	989 Corona Street Denve...	Apartment	HHP	4/22/21, 12:13 PM
A-00000	6564 Ogden Street Adam...	Apartment	HHP	4/22/21, 12:02 PM

From here, you can access individual setting information or associate to a new setting.

To associate to a new setting click the “Search Setting” button on the top right of the list of settings. This will bring you to the **Setting Search** screen:

**Setting Search** ✕ Exit

☒ **Setting Selection**

☐ Setting Review

☐ Add Caregivers

☐ Add Participants

☐ Add PASA Contacts

Setting Selection

\* Street Number

\* Street Name

Unit Number

\* City

\* County

\* Zip Code

On this screen you will enter the information in the appropriate fields following some specific guidelines.

## Usage Rule 1:

- 1) No Abbreviations. Always spell out every word of the street name, with the exception of numbers; for example:
  - a. East 2<sup>nd</sup> Street rather than E. 2<sup>nd</sup> St.
  - b. County Road 34 South rather than CR 34 S.
  - c. Saint Paul Street rather than St. Paul St.
- 2) For Grand Junction streets that include fractions leave the suffix off the numbers, for example:
  - a. East 24 ½ Street rather E. 24<sup>th</sup> ½ St.
- 3) When entering Apartment information use a "#" then the unit number or letter. Do not use words like Unit, Apt, Lot, etc. If there is a specific building that number or letter should come first, followed by a dash then the apartment number. So, for Building 3 unit D7 you would enter it as "#3-D7"

Why does this matter?

- This program is meant to inspect residential settings for adults with disabilities, and to maintain a record of those inspections. Because of this we need to use the setting address as the primary piece of information, (the asset). The asset is at the top of the hierarchy and all other information is related to and depends on its association to the asset. In an effort to better understand the movements of providers and individuals in services it is important that PASAs associate to existing settings whenever possible to maintain its history of previous associations. We need to respect HIPAA regulations, so only **exact** matches will appear when searching for an address; therefore, it is vital for everyone to follow the same naming conventions when entering and searching for settings in the database.

Enter the address using the guidelines above and click the "Search" button.

**If the setting is not in the system, click the "Create Setting" button:**

The screenshot shows a web application interface titled "Setting Search". On the left is a sidebar with five radio button options: "Setting Selection" (selected), "Setting Review", "Add Caregivers", "Add Participants", and "Add PASA Contacts". The main area is titled "Setting Selection" and contains a form with the following fields: "Street Number" (8894), "Street Name" (1st Street), "Unit Number" (empty), "City" (Westminster), "County" (Adams), and "Zip Code" (80234). There are "Reset" and "Search" buttons at the bottom of the form. Below the form, a large red circle highlights a message that reads: "Empty collection" with a magnifying glass icon, "No settings matched your request", and a "Create Setting" button.

If the setting is already in the system, it will appear below the search area and look like this:

**Setting Search** ✕ Exit

**Setting Selection**

\*Street Number: 656 \*Street Name: Lincoln Street Unit Number:   
\*City: Denver \*County: Denver \*Zip Code: 80203   
✕ Reset 🔍 Search

\* Available Settings

656 Lincoln Street  
Denver, Denver 80203

Next

Click on that setting, then click the “Next” button

This will bring you to a screen where you can verify the setting and property owner information. If you have additional or conflicting property owner information, it can be entered in the “Property Owner Additional Information” field. You will also need to select how your PASA is associated to this setting from the dropdown menu at the bottom of the screen

**Setting Review**

**SETTING INFORMATION**

**Characteristics**

\* Structure Type: Single Family Home \* Total Number Bedrooms: 4   
\* Year Built: 1,999 \* Status: New   
CHRP Placement: ☒   
**Owner Information**

\* Property Owner Name: Sean Connery \* Property Owner Phone: 303-666-7476   
Property Owner Additional Information:   
**Address**

\* Street Number: 656 \* Street Name: Lincoln Street Unit Number:   
\* County: Denver \* City: Denver \* Zip Code: 80203   
**ASSOCIATION INFORMATION**

\* Setting Type: Select an option   
Complete this field.

Previous Next

Once all the information has been entered you can click the “Next” button. This will take you to a screen where you can see any caregivers already associated with the address and add additional caregivers. This is where we will encounter our next system guideline.

**Setting Search** ✕ Exit

☐ Setting Selection

☐ Setting Review

☒ **Add Caregivers**

☐ Add Participants

☐ Add PASA Contacts

**Add Care Givers**

All fields Search... Add Caregiver

Rows per page 25 1 of 1 pages (1 items) < >

NAME	EMAIL	PHONE	ADDITION...	PASA NAME	CREATED ...
Ed Harris	rock@rock.r...	720-999-4562		Test PASA	6/10/21, 1:1...

Rows per page 25 1 of 1 pages (1 items) < >

Previous Next

## Usage Rule 2:

- 1) Even if the caregiver that your PASA will be contracting with is already listed click the “Add Caregiver” button and enter their information.
- 2) There should never be a situation where you are not adding a Caregiver in this screen

Why is this important?

- In building this system we had to allow for PASAs to regulate their own association with settings because of the amount of movement that we see. When a PASA disassociates with a setting all of the information that is tied to that PASA will be removed from the setting as well. Therefore, if you do not add a caregiver, and another PASA disassociates, the setting may be left without a listed caregiver.

## New Entry

\* Caregiver Name

\* Caregiver Phone

Caregiver Email

Caregiver Additional Information

[Cancel](#)
[Save](#)

Once you have entered the Caregiver information and click save, you will see them appear on the Caregivers screen.

## Setting Search [X Exit](#)

- ☐ Setting Selection
- ☐ Setting Review
- ☒ **Add Caregivers**
- ☐ Add Participants
- ☐ Add PASA Contacts

### Add Care Givers

All fields ▾
Search... Q

[Add Caregiver](#)

Rows per page 25 ▾
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NAME	EMAIL	PHONE	ADDITION...	PASA NAME	CREATED ...	
Ed Harris	rock@rock.r...	720-999-4562		Test PASA	6/10/21, 1:1...	...
Ed Harris	rock@rock.r...	720-999-7412		PASA Agenc...	6/10/21, 1:2...	...

Rows per page 25 ▾
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[Next](#)

Notice in the example above the same Caregiver has been added by two different PASAs! Any typos, or mistakes can be corrected by clicking the three dots on the right and selecting the "Edit" option. When you have finished adding Caregivers click the "Next" button to proceed to the **Participant Entry** screen

## Setting Search

Setting Selection

Setting Review

Add Caregivers

**Add Participants**

Add PASA Contacts

### Add Participants

All fields Search...

Add Participant

Rows per page 25

1 of 1 pages (1 items) < >

NAME	MEMBER ID	VOUCHER	PASA NAME	CREATED DATE
Nicolas Cage	W852456	<input type="checkbox"/>	Test PASA	6/10/21, 1:09 PM

Rows per page 25

1 of 1 pages (1 items) < >

Previous

Next

On this screen, you will be able to see any Participants who are already living in this setting (even if they are not a member of your PASA). If you do not currently have a Participant at the setting you can click the "Next" button. If you do have a Participant at the setting you will click the "Add Participant" button.

## New Entry

\* Participant Name

Complete this field.

\* Participant Member Id

Does participant have a Housing Voucher? ⓘ

☐

Cancel

Save

On this screen you will enter the Participants name and Medicaid ID as well as indicate whether or not they have a Housing Voucher. This is also where we will encounter our next system guideline.

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June 2021

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### Usage Rule 3:

- 1) Always use the Participant's full legal name.

Why is this important?

- This one is straight forward, but while you may know the Participant by a nickname or other preferred name, we do not. When cross-referencing information from this system in other Department of Health Care Policy and Financing (HCPF) or Colorado Department of Public Health and Environment (CDPHE) systems it will help us to have the Participant's legal name.

**Setting Search** ✕ Exit

☐ Setting Selection

☐ Setting Review

☐ Add Caregivers

☒ **Add Participants**

☐ Add PASA Contacts

**Add Participants**

All fields  🔍 Add Participant

Rows per page: 25 1 of 1 pages (2 items) < >

NAME	MEMBER ID	VOUCHER	PASA NAME	CREATED DATE	
Nicolas Cage	W852456	<input type="checkbox"/>	Test PASA	6/10/21, 1:09 PM	...
David Morse	Q841236	<input type="checkbox"/>	PASA Agency 1.0	6/10/21, 2:14 PM	...

Rows per page: 25 1 of 1 pages (2 items) < >

Previous Next

When you have entered the Participant information, click "Save" the system will bring you back to the **Participant Entry** screen and you will see the Participant that you have added. Once you have added all Participants click the "Next" button to move to the **PASA Contact** screen.

## Setting Search

☐ Setting Selection  
☐ Setting Review  
☐ Add Caregivers  
☐ Add Participants  
☒ Add PASA Contacts

### Add PASA Contacts

All fields Search...

New PASA Contact

Rows per page 25 1 of 1 pages (1 items)

NAME	EMAIL	PHONE	ADDITION...	PASA NAME	CREATED ...
Claire Forlani	claire@rock....	720-333-5656		Test PASA	6/10/21, 2:1...

Rows per page 25 1 of 1 pages (1 items)

Previous Finish

This screen will allow you to enter information about who specifically to contact with the PASA should there be questions about the setting. This information will also be used if an inspector arrives on site and cannot reach the listed Caregiver contact. To enter the PASA contact information click the "Add PASA Contact" button

## New Entry

\* PASA Contact Name

|

Complete this field.

\* PASA Contact Email

\* PASA Contact Phone

PASA Contact Additional Information

Cancel

Save

Enter the information in the appropriate fields and click "Save" to be returned to the **PASA Contact** screen, and you should see the new contact listed.



## Setting Search ✕ Exit

☐ Setting Selection
 ☐ Setting Review
 ☐ Add Caregivers
 ☐ Add Participants
 ☒ **Add PASA Contacts**

### Add PASA Contacts

All fields ▾ Search...

New PASA Contact

Rows per page 25 ▾

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NAME	EMAIL	PHONE	ADDITION...	PASA NAME	CREATED ...	
Claire Forlani	claire@rock...	720-333-5656		Test PASA	6/10/21, 2:1...	...
Michael Biehn	michael@roc...	303-454-9713		PASA Agenc...	6/10/21, 3:2...	...

Rows per page 25 ▾

1 of 1 pages (2 Items) < >

Previous

Finish

When all of the information has been completed click the "Finish" button and you will be taken to the **Setting Information** screen for that specific setting.

← Association Information

A-00316

Edit

Disassociate

PASA

PASA Agency 1.0

Associated On

06/09/21

Type

HHP

Type Comments

--

Setting Information

S-00102

Edit

Address

656 Lincoln Street Denver 80203

Structure Type

Single Family Home

Bedrooms

4

Year Built

1999

Status

New

Owner Name

Sean Connery

Owner Phone

303-666-7476

Owner Additional Information

--

CHRP Placement

☒

Housing Voucher

☐

Last Passed Inspection Date

--

Caregivers

Participants

Contacts

Inspections

Inspector Activities

All fields ▾ Search...

Add Caregiver

Rows per page 25 ▾

1 of 1 pages (2 Items) < >

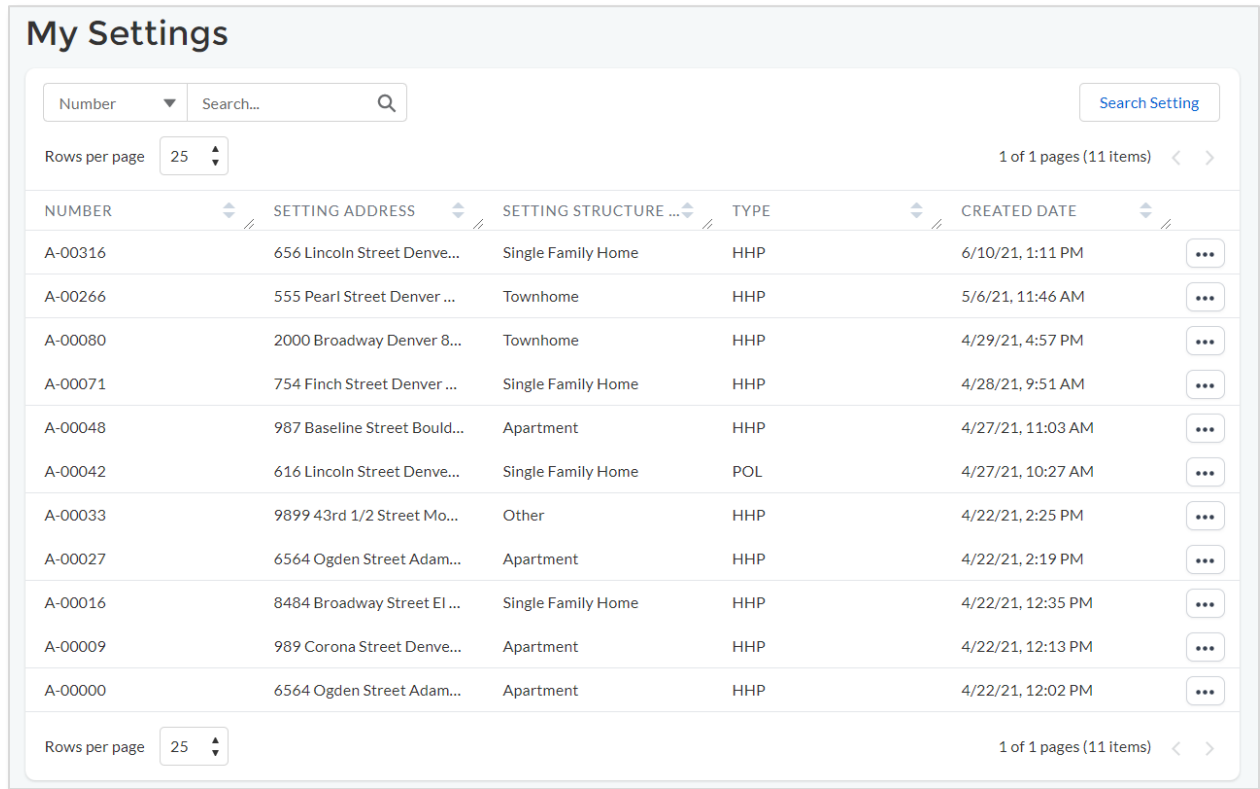
NAME	EMAIL	PHONE	ADDITIONAL INF...	PASA NAME	CREATED DATE	
Ed Harris	rock@rock.rock	720-999-7412		PASA Agency 1.0	6/10/21, 1:34 PM	...
Ed Harris	rock@rock.rock	720-999-4562		Test PASA	6/10/21, 1:10 PM	...

Here you can see the top row of "Association Information" has information specific to your PASA and its relationship to this setting. The second row of "Setting Information" lists information specific to that setting including whether or not it has a CHRP placement, and whether or not any Participant in the home holds a Housing Voucher. Below that, beginning with "Caregiver" are tabs that will allow you to navigate to the respective pieces of information those tabs contain.

To return to your PASAs list of associated settings, click the arrow on the top left next to "Association Information."

## Disassociation:

PASAs can disassociate from entities individually or completely disassociate from a setting and everything associated with it. To disassociate from a setting first navigate to the **Home Screen**:



**My Settings**

Number ▼ Search... Search Setting

Rows per page 25 1 of 1 pages (11 items) < >

NUMBER	SETTING ADDRESS	SETTING STRUCTURE ...	TYPE	CREATED DATE	
A-00316	656 Lincoln Street Denve...	Single Family Home	HHP	6/10/21, 1:11 PM	...
A-00266	555 Pearl Street Denver ...	Townhome	HHP	5/6/21, 11:46 AM	...
A-00080	2000 Broadway Denver 8...	Townhome	HHP	4/29/21, 4:57 PM	...
A-00071	754 Finch Street Denver ...	Single Family Home	HHP	4/28/21, 9:51 AM	...
A-00048	987 Baseline Street Boul...	Apartment	HHP	4/27/21, 11:03 AM	...
A-00042	616 Lincoln Street Denve...	Single Family Home	POL	4/27/21, 10:27 AM	...
A-00033	9899 43rd 1/2 Street Mo...	Other	HHP	4/22/21, 2:25 PM	...
A-00027	6564 Ogden Street Adam...	Apartment	HHP	4/22/21, 2:19 PM	...
A-00016	8484 Broadway Street El ...	Single Family Home	HHP	4/22/21, 12:35 PM	...
A-00009	989 Corona Street Denve...	Apartment	HHP	4/22/21, 12:13 PM	...
A-00000	6564 Ogden Street Adam...	Apartment	HHP	4/22/21, 12:02 PM	...

Rows per page 25 1 of 1 pages (11 items) < >

From here, identify the setting that you would like to disassociate from, click the three dots on the far right, and select "View."

This will take you to the **Setting Information** screen:

The screenshot shows the 'Setting Information' screen for S-00102. At the top, there is a header for 'Association Information A-00316' with an 'Edit' button and a red 'Disassociate' button circled in red. Below this, the 'Setting Information S-00102' section contains fields for Address (656 Lincoln Street Denver 80203), Structure Type (Single Family Home), Bedrooms (4), Year Built (1999), Status (New), Owner Name (Sean Connery), Owner Phone (303-666-7476), Owner Additional Information, CHRP Placement (checked), and Housing Voucher (empty). A 'Last Passed Inspection Date' of 06/14/21 is also shown. Below the setting information, there is a tabbed interface with 'Caregivers' selected. The 'Caregivers' tab shows a table with columns: NAME, EMAIL, PHONE, ADDITIONAL INFO, PASA NAME, and CREATED DATE. There are two rows of data for Ed Harris. The first row is associated with 'PASA Agency 1.0' and the second with 'Test PASA'. Both rows have a three-dot menu icon on the right. The table is on page 1 of 1 with 2 items.

Clicking the red “Disassociate” button in the corner you will be prompted with the following:

The screenshot shows a 'Disassociate Setting' confirmation dialog. It features a red warning triangle icon and the text: 'Are you sure you want to disassociate from the setting? All of your data will be permanently removed. This action cannot be undone.' At the bottom right, there are two buttons: 'Cancel' and 'Confirm'.

Clicking confirm will completely disassociate your PASA from this setting and all information you have added. The setting will no longer appear on your home screen and this will indicate that your PASA is no longer working with this setting. This option should only be used if you do not plan on working with the chosen setting moving forward. If you no longer have an individual placed there, but may use the setting again, you can disassociate individual data rather than removing the setting from your PASA.

To disassociate from individual entities within a setting, select the setting from the **Home Screen** by clicking the three dots on the far right and click on “View.”

This will take you to the **Setting Information** screen. From here use the tabs to navigate to the entity that you want to disassociate from:

Association Information  
← A-00316

PASA: PASA Agency 1.0, Associated On: 06/09/21, Type: HHP, Type Comments: --

Setting Information  
S-00102

Address: 656 Lincoln Street Denver 80203, Structure Type: Single Family Home, Bedrooms: 4, Year Built: 1999, Status: New

Owner Name: Sean Connery, Owner Phone: 303-666-7476, Owner Additional Information: --, CHRP Placement: ☒, Housing Voucher: ☐

Last Passed Inspection Date: 06/14/21

Caregivers | **Participants** | Contacts | Inspections | Inspector Activities

All fields Search... Add Participant

Rows per page: 25 1 of 1 pages (2 items)

NAME	MEMBER ID	VOUCHER	PASA NAME	CREATED DATE	
Nicolas Cage	W852456	<input type="checkbox"/>	Test PASA	6/10/21, 1:09 PM	...
David Morse	Q841236	<input type="checkbox"/>	PASA Agency 1.0	6/10/21, 2:14 PM	...

Clicking the three dots on the far right will give you the option to disassociate from that specific entity. This method should be used when Participants move from a home that your PASA intends to use again in the future, or in cases when a caregiver changes in the home.

## Inspections:

You can view any past inspections and the documents associated with them by clicking on the inspections tab under the **Setting Information** screen:

Association Information  
← A-00316

PASA: PASA Agency 1.0, Associated On: 06/09/21, Type: HHP, Type Comments: --

Setting Information  
S-00102

Address: 656 Lincoln Street Denver 80203, Structure Type: Single Family Home, Bedrooms: 4, Year Built: 1999, Status: New

Owner Name: Sean Connery, Owner Phone: 303-666-7476, Owner Additional Information: --, CHRP Placement: ☒, Housing Voucher: ☐

Last Passed Inspection Date: 06/14/21

Caregivers | Participants | Contacts | **Inspections** | Inspector Activities

1 / 1 items

I-00022  
Inspection Date: 06/14/21, 04:38 PM Submitted

Type: Regular, Result: ☒ Passed, Follow up Date: --, Files: View, Created Date: 06/14/21

To download the files, click the blue “View” button under the word Files. This will show a little more detail about the inspection as well as give you the option to download any files that were attached to that specific inspection:

I-00022

Submitted

Inspection Date: 06/14/21, 04:38 PM

Type	Result	Follow up Date	Files	Created Date
Regular	✓ Passed	--	<a href="#">Hide</a>	06/14/21

Summary

This place is a fortress!

Result Comments

--

Uploaded Files (1 items)

Short Form - Fillable PDF.pdf

Download

The Inspector Activities tab is where inspectors will document attempts at communication with the Provider/Home Owner or any issues that they encountered in scheduling the inspection.

← Association Information

A-00316

Edit

Disassociate

PASA	Associated On	Type	Type Comments
PASA Agency 1.0	06/09/21	HHP	--

Setting Information

S-00102

Edit

Address	Structure Type	Bedrooms	Year Built	Status
656 Lincoln Street Denver 80203	Single Family Home	4	1999	New
Owner Name	Owner Phone	Owner Additional Information	CHRP Placement	Housing Voucher
Sean Connery	303-666-7476		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Passed Inspection Date				
06/14/21				

Caregivers

Participants

Contacts

Inspections

Inspector Activities

Inspector Activities

Tom Collins

6/14/2021, 04:40 PM

Home owner cancelled previous inspection (6/10), but was able to reschedule and complete today (6/14)

Contact Ben Steinbook with any questions:

Email: [irss.residential.inspections@state.co.us](mailto:irss.residential.inspections@state.co.us)

Phone: 303-864-8434

## **IRSS Inspections Program – Salesforce Application FAQ**

- 1) **If a host home provider moves should I edit the address or disassociate from the setting and create a new one?**
  - a. In this scenario the PASA should disassociate from the setting and create a new one. PASAs do not have the ability to change address information in the system once it has been saved.
- 2) **If I have made a typo when entering the address how can we correct it?**
  - a. If there is a typo in the address, please send an email to [irss.residential.inspections@state.co.us](mailto:irss.residential.inspections@state.co.us) and let us know what needs to be corrected. We are able to make these edits for you.
- 3) **Do Family Caregiver (FCG) settings need to be added to the new system?**
  - a. This will depend on how the setting is associated to the PASA. If the FCG is operating out of a PASA Owned/Leased setting then yes, that setting should be listed in the application. However, if the FCG is operating out of a setting that they own (and they are not a manager/employee of the PASA), or that they lease from an entity that is separate from the PASA, they would not have to be listed.
- 4) **Do Independent Living settings need to be included in the new system?**
  - a. Similar to FCG settings this will depend on how that setting is established. If the individual lives in a setting that they own or are the sole lease holder; they do not need to be included in the new system. If, however the PASA is in anyway named on the lease (for example: the lease holder, the co-signer, or the guarantor) then the setting should be listed.
- 5) **Should we continue to complete HUD inspections of our settings?**
  - a. We are still working to get our inspectors registered with this program and assigned a territory. In the interim it would be best practice for you to continue inspecting your settings however you have done it in the past. Once we are able to get our inspectors active, we will not be able to accept inspections complete by the PASA on their own settings.
- 6) **Where can I find a link to the recorded trainings?**
  - a. You can access the video here: [youtu.be/THTDfRR4BVU](https://youtu.be/THTDfRR4BVU) or on the HCPF website at [hcpf.colorado.gov/IRSS-inspections-program](https://hcpf.colorado.gov/IRSS-inspections-program)