



# San Francisco ONE System Agency Lead Training



Today's Trainer: Jon Hoskins, Interim Senior Project Administrator at Bitfocus

# Overview

Today's training will cover:

- Your role as liaison between your agency and your Bitfocus System Administration team
- Expectations around communication in this role
- Expectations around data quality for your agency
  - Requesting new user accounts
  - Deactivating user Accounts
  - Change in Access Roles
  - Agency Lead Data
- And resources available to you as you engage in this work

# Goals

By the end of this training you should be:

- Familiar with the responsibilities and expectations of the Agency Lead role
- Understand how this role functions in relation to your agency, the ONE System, and your CoC
- And you should understand what resources are available to support you as you do this work

# What is an Agency Lead?



# Agency Lead Definition

Each agency that participates in the ONE System is responsible for designating an Agency lead. This person acts as a liaison between their agency and the ONE System team, which includes the Bitfocus help desk and system administration teams, as well as relevant Department of Homelessness and Supportive Housing (HSH) staff. Depending on the needs of the agency, the agency lead may also take on additional responsibilities, for example, around security and data quality. We'll get into all of these responsibilities during this training.

# Agency Lead Roles and Responsibilities

# New User Accounts

The standard protocol for creating new user accounts is:

- The staff must complete the Clarity General Training, Registration for the online training is available through the **ONE SF Help Center**
- The staff must also complete the **DPH privacy training**. Please note that HSH authorized Veterans Administration users to apply the VA Privacy Training in place of the DPH privacy training. Bitfocus does not track completion of this training, though the user will self-certify completion when they sign the electronic end-user agreement.
- An ONE System Agency Lead must authorize the user to be set up under their own agency. Agency Lead will email the name, email address, and access role of the requested new user, and if they need additional agency access as part of their work in the ONE System to the Help Desk at [onesf@bitfocus.com](mailto:onesf@bitfocus.com)
- Bitfocus staff will verify the user has completed the required Clarity General Training and any additional requirements for Coordinated Entry Access Point staff and set up the new user account

# Issues with users at your agency

- When staff at your agency reach out to us to request access to the ONE System, or changes to their current access in the system, we bring you into the conversation to make sure the request is valid, and any necessary requirements are completed. In most cases we would prefer that you are the person requesting user role changes..

**This usually is connected to the following processes:**

- New User Activation
- Deactivating a User
- Access Role Changes

# New User Accounts Tips

- Refer to the [Summary of Access Roles](#) document for more information on ONE System Access Roles
- If you are unclear on what access role this new user should have, please contact the San Francisco System Administration Team or the Help Desk so that we can better understand the user's work in the ONE System. We can recommend an appropriate access role.
- Refer to the [Summary of Access Roles](#) document for more information on ONE System Access Roles

# Deactivating User Accounts & Access Role Changes

## Deactivating User Accounts

- When a ONE System user leaves an agency, the Agency Lead must submit a request to Bitfocus to deactivate their accounts within (1) work day.

## Access Role Changes

- If a user's job role changes and they need a different access level, the Agency Lead should notify Bitfocus within (1) work day of the appropriate change
- Please send request to [onesf@bitfocus.com](mailto:onesf@bitfocus.com).

# Security Officer

Depending on your agency, you may also fill the role of Security Officer. The security officer is responsible for ensuring that your agency is following ONE System and HSH policies around privacy and security. This includes:

- Ensure your users complete the San Francisco Department of Public Health Privacy System
- Coordinate with your system administration team around bi-annual agency audits
- Notify your system administration team of any potential misuses of data, data breaches, or other security or privacy concerns

If you are not the security officer for your agency, you may want to coordinate with this person around these issues so that you are aware of anything that may impact your responsibilities as agency lead.

# Communication

- The most important part of the Agency Lead role is acting as the communication liaison for all things ONE System related. This includes receiving communication from Bitfocus and sharing it with the appropriate staff at your agency, as well as providing important information about your agency to your Bitfocus team.
- There are several kinds of communication you'll regularly receive from us, and several things we'll expect from you. I'm going to go over each of these in detail, but there's also a one-page summary and resource guide at the end of this training that will sum up everything I cover.



# Communications we'll share with you

We'll reach out to you both regularly and as-needed around a variety of issues. Here are the four main types of issues you'll hear about from us:

- Changes that impact workflow/data collection
- Training opportunities related to the ONE System
- Issues related to your agency's ONE System data
- Issues with users at your agency

# Changes that impact workflow/data collection

## Changes that impact workflows or data collection happen when:

- HUD releases new data standards
- HSH leadership want to roll out new features in the ONE System or change ONE System-related policies
- When funders require new data elements be collected in ONE, etc.

Any time there is a change that impacts how you use the ONE System, we'll let you know about the change and any additional details and resources you need to know about

# How you'll hear from us

- Articles in monthly newsletter
  - Small changes will be written up as articles in our monthly newsletter that goes out to all ONE System users
  - Larger changes will also be written up in the newsletter but will likely be detailed in additional emails
- **Additional emails that include timelines, impacts, and available resources and support available**
- **Trainings or office hours sessions**
  - This time is utilized to get your questions answered regarding ONE System Functionality
- **Monthly agency lead meetings**
  - Created to keep you well informed of changes so that you can have the resources needed to share with your organization.

# What we'll expect from you

Part of your role as Agency Lead is taking action on the information you receive from us and sharing the information with relevant staff at your agency.

- Will users be impacted?
- Will your program managers need to work with staff to incorporate new changes?
- Will your reporting staff need to know about new data elements?
- Make sure all impacted users know about timelines, resources available, and any upcoming trainings.
- Depending on the extent of the changes, you may need to coordinate trainings within your agency as well, to address your specific issues and changes.

# Training opportunities related to San Francisco ONE System

- We provide regular trainings in the community on a variety of topics, including some opportunities to dig into complicated ONE System-related subject matter.
- We will let you know ongoing regarding upcoming trainings and we'll periodically request feedback on the trainings we might offer in the future
- [SF One Help for Training Schedule](#)

# How you'll hear from us

- Monthly newsletter
- Emails providing additional information
- And sometimes, through a direct invitation with information about expected attendance

# What we'll expect from you

- Although trainings are generally shared with all users, please make sure that any users at your agency who could benefit from a particular topic are planning to attend.

# Issues related to your agency's ONE System data

We regularly review data in ONE System and can offer technical assistance regarding your data questions. These issues include:

- Missing data
- Data entered incorrectly
- Data that conflicts with other data in the system
- Data that doesn't comply with HUD or other funder expectations



# How you'll hear from us

- Questions related to your data are generally communicated through direct emails from your system administration team.

# What we'll expect from you

Are you:

- Responsible for addressing data issues?
- Responsible for coordinating correction with other staff?
- The person who hands this information over to someone else?
- All three?

No matter which role you play at your agency, we expect you to take responsibility for getting the issues resolved. We know this can be one of the most challenging parts of this role, so we are eager to work with you to provide the resources and support you need in addressing data quality issues at your agency. One of those resources is San Francisco's Continuous Data Quality Improvement Plan. You can familiarize yourself with your plan by using the link in the resource guide at the end of this training.

# How you'll hear from us

You'll be included on the ticket (which will come to you as an email) any time we need confirmation or additional information from you about a user issue at your agency.

# What we'll expect from you

Once you're notified about an issue related to a user, we expect you to coordinate in the following ways:

- Timely response
- Respond via email, phone, or chat
- Include information needed to approve or deny users request
- Contact information for your help desk team is located in the resource section of this training

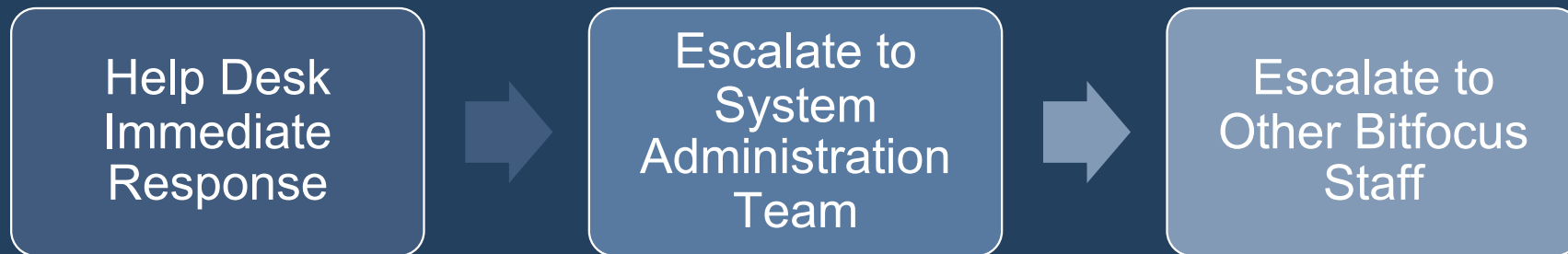
# Communications we need from you

Although we'll regularly reach out to you, there are also times when we need to hear from you. Here are a few types of issues we would love to hear about:

- To ensure that staff at your agency get access to the ONE System in a timely manner, we need to know when new staff start.
- To ensure client privacy and the security of our ONE System, we need to know when staff leave, or when it's necessary to change staff access levels.
- To ensure that the ONE System accurately reflects your agency's data, we need to know if any projects at your agency start or end, or if there are changes to any of your projects.
- To ensure that issues are resolved in a timely manner, we need to know if you see any unexpected data issues for your projects.
- To protect client privacy and confidentiality, we need to know about any potential privacy concerns or issues or possible data breaches.

# Help Desk

Always reach out to us first through the Bitfocus Help Desk. The Help Desk is available from 5am to 5pm.



# Data Quality

As Agency Lead, you are one of the key people responsible for data quality at your agency. These duties include:

- Ensure programs at your agency comply with HUD and other federal partner data collection requirements
- Ensure that programs at your agency comply with local data collection requirements
- Address common data quality issues in your data
- Determine and/or communicate which staff at your agency have access to the ONE System data analysis tools
- Ensure that staff at your agency are familiar with which reports in the ONE System Report Library will provide them with the data they need

**TIP: Run your Data Quality Report Routinely**

# Agency Guide to Data Quality

We recommend that you watch our “Agency Guide to Data Quality Training” which is available through our learning management system. This training will review:

- Common data quality issues and how to identify and resolve them
- The schedule by which we recommend you review data quality
- The data quality monitoring completed by your system administration team
- The details of your community’s continuous data quality improvement plan
- Resources available to you to assist with data quality monitoring



**We are a team!**

# How we can help you

We know that being an Agency Lead is a big job, especially when you consider all the other hats you wear at your agency, and we want to help you be successful in this role. Bitfocus will do our best to help you in the following ways:

- We will communicate important information clearly and in a timely manner
- We will respond to your issues quickly
- We will work with you to find solutions
- We will host meetings and trainings that are useful and available in a variety of formats
- We will provide resources that help make your job easier
- If we don't have materials that you can use, we will work with you to create something!

# How you can help us

We know how important Agency Leads are to the success of our ONE System, so we do our best to make sure you are successful. Here are additional ways you can partner with us:

- Pay attention to communication and share as appropriate
- Be clear on HSH and ONE System expectations and policies so that you can support your agency in complying
- Be timely in your responses
- Attend agency leads meetings
- Share your feedback

# Resources

# OneSF Help Center



ONESF Login



[Login to OneSF](#)

[Vacancy Tracker App](#)

[Vacancy Tracker Procedures and Guidelines](#)

## Recently viewed articles

[Department of Homelessness and Supportive Housing Privacy Practice and Releases of Information](#)

[One-SF HMIS General User Training](#)

[How to receive a New OneSF End User Account for the ONE System](#)

[ONESF Training Videos and Handouts](#)

[Coordinated Entry Training Materials](#)

## Top Articles

[How to receive a New OneSF End User Account for the ONE System](#)

[Working with Your Staff Profile](#)

[Department of Homelessness and Supportive Housing Privacy Practice and Releases of Information](#)

[Annual Progress Report \(APR\) Manual](#)

[Please add us to your list of contacts](#)

[ONE System Trainee Satisfaction Survey](#)

[OneSF User Mailing List](#)



# Resources

- Please visit ONE SF (<https://onesf.clarityhs.help/hc/en-us>) website where you can receive interactive tools to help you with your ONE system needs.

## Such As:

- Training and workflow information
- Agency Lead presentation slides
- Helpful Homeless Response System documents
- San Francisco Data Quality Plan



<http://training.bitfocus.com> is where you can find recorded training resources, such as the ONE SF- Clarity Human Services General training (if you'd like a refresher or need to direct new users). These trainings are available whenever you or your staff at your agency need them.

# Bitfocus Training

## About this course

The Clarity Human Services General Training was designed with the end user in mind. We've deliberately created this content partnering with your system admin communities with these key goals:

- *Acclimate you to Clarity Human Services in the general role*
- *Show you some of the functionality of Clarity Human Services software*
- *Test your knowledge of the information presented*
- *Help you understand the software and gain insight you might not have had before this course*
- *Prepare you for some real-world scenarios*

## Curriculum (73 min)

### Unit One

- ▶ Lesson One - Login Page and Two Factor Authentication (2FA) (2 min)
- ▶ Lesson Two - User Policy (3 min)
- ▶ Lesson Three - Homepage and Launchpad (2 min)
- 📄 Bitfocus Help Center
- ✔ Unit One - Knowledge Check (5 min)





# SUPPORT



And of course, don't forget the help desk. The help desk is available 5am to 5pm, Monday through Friday, by phone, email or chat. If you aren't sure where to turn or where to find the resources you need, the help desk is always a great place to start.

**Bitfocus Helpdesk**

**[onesf@bitfocus.com](mailto:onesf@bitfocus.com)**

415.429.4211



# Thanks for joining us!



**Ja Eun Guerrero  
Huh, LCSW**  
Senior Project  
Administrator



**Jon Hoskin, MSW**  
Interim Senior Project  
Administrator



**Sara Hoffman**  
Project Manager