

Care Coordinator ONE System Training 5/25/21



Agenda

- Welcome
- Creating New Profiles
- Release of Information
- Uploading Documents
- Resources

Creating New Profiles



Creating New Profiles - Searching for Clients in ONE

- Search for client
 - Search by name , partial name, DOB and SSN
- If unable to find, create a new profile

SEARCH FOR A CLIENT ADD CLIENT +

Search by name, partial name, DOB or SSN SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Managed with Clarity Human Services Recover deleted data



Creating New Profiles

- Please make sure to collect as much information as possible, and avoid using “Client refused” or Data Not Collected” whenever possible
- For existing profiles, confirm that all information is correct and up to date

SEARCH FOR A CLIENT

ADD CLIENT +

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Gender

Race

Ethnicity

Please fill in Release of Information form

CANCEL



Release of Information



Release of Information

- When creating a new client profile, ONE will prompt you to have the client sign a Release of Information (ROI) or give verbal consent.
- The Release of information enter date, should correspond with both the date that the client signed the release and the date you created the client profile.
- Complete both Homeless Response System (HRS) and Human Services Agency (HSA) ROI

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	01/07/2021	
End Date	01/07/2024	
Documentation	▼ Select Electronic Signature Verbal Consent	

ELECTRONIC SIGNATURE FORM

By completing this form, you are certifying the client:

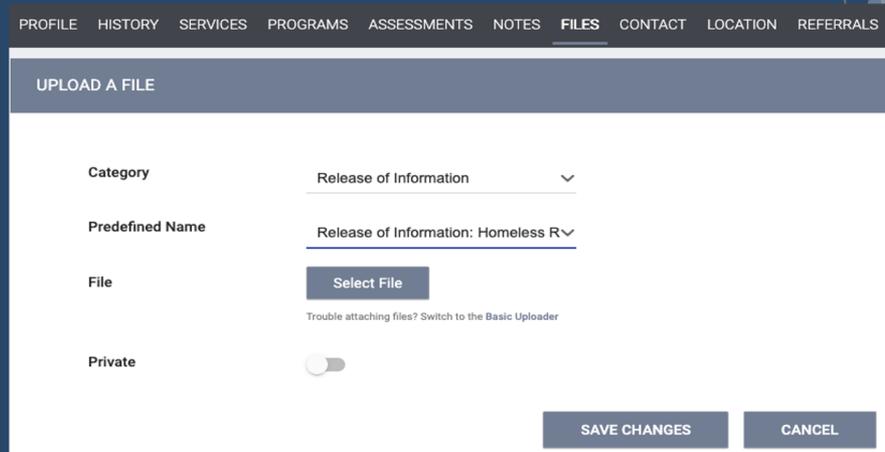
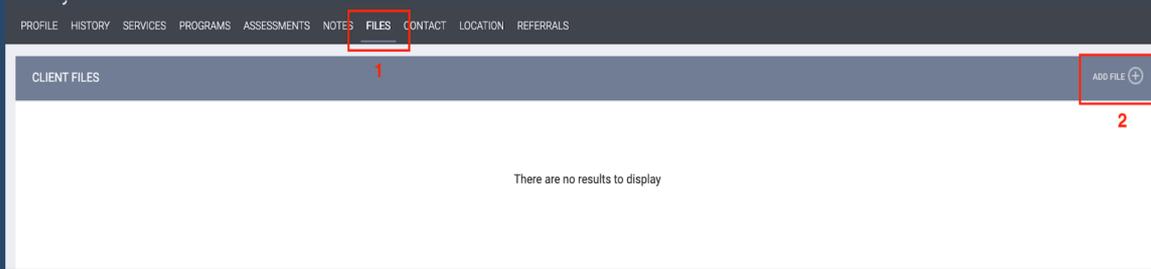
- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System

Any signed Release of Information forms must be uploaded in client files.

SAVE CANCEL

Uploading ROIs

- To upload an ROI, select the files tab
- Select the category for Release of Information



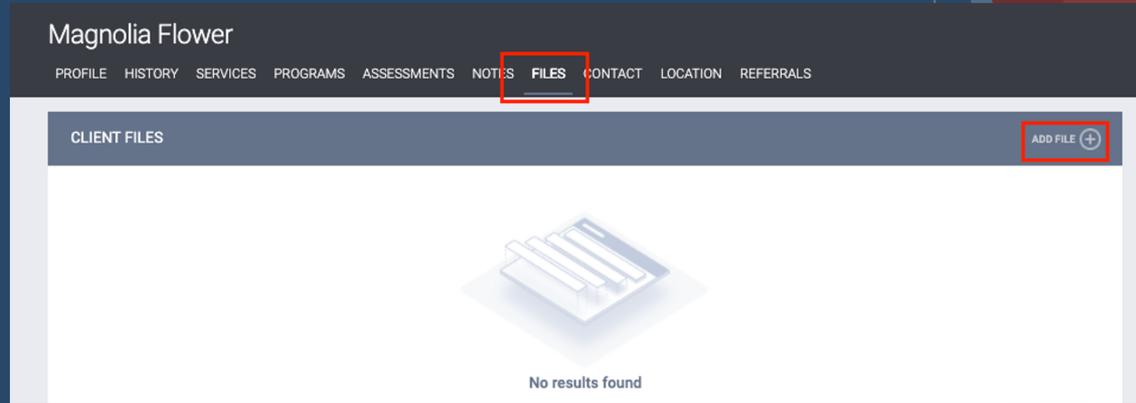
Uploading Files



Uploading Files & Documents

From the client profile:

- Files
- Select 'Add File'.
- Category
- Predefined Name



Uploading Files & Documents

File Type Categories

- ✓ Background Check
- CalWORKs HSP Documents
- CES
- Family, Social and Legal
- Finances and Income
- Health and Medical
- Homelessness Prevention Assistance Providers
- Housing Ladder Application
- HPRP Documentation
- Permanent Housing Application Forms and Documentation
- Personal Identification
- Release of Information

Uploading Files & Documents

- CoC Application Package
 - Background Check Release Form
 - Form B (Certification of Homelessness)
- Finances and Income
- Personal Identification
- Other
 - Rehousing Participation Agreement
- Release of Information
 - Homeless Response System
 - Human Services Agency

Resources



Resources

Bitfocus Help Desk

onesf@bitfocus.com or (415) 429-4211

Bitfocus Community Administration

Onesf-admin@bitfocus.com

ONESF Help Center Web Page

<https://onesf.bitfocus.com/>

The Help Desk Widget

