

Category B and C ONE System Training

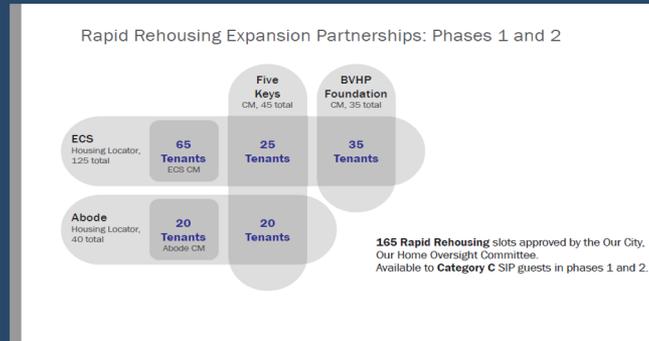
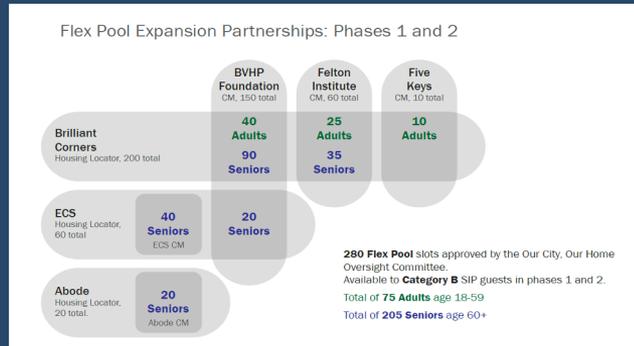


Agenda

- Welcome
- Workflow management
- Referrals
- Program Enrollment
- Services
- Notes
- Housing Move-in Date
- Program Exit
- Reports
- Solutions to Common Problems
- Resources



Workflow Management for Flex Pool vs RRH



For Housing Locators in Flex

- Enroll your client into the program
- Input Housing Move in Date
- Put in Services and Notes

For Case Managers in RRH

- Enroll your client into the program
- Put in Services and Notes

Workflow Management for Flex Pool vs RRH

For Case Managers in Flex Pool

- Switch your agency to the Housing Locator Agency
- Put in Services and Notes

For Housing Locators in RRH

- Switch your agency to the Case Management Agency
- Input Housing Move in Date
- Put in Services and Notes

We will cover switching agencies in a later slide

Referrals



Access and Referral Notifications

- Please let the ONE System team know who from your teams will need:
 - Additional agency access
 - Referral notifications
- Providers will receive a notification via email when a referral has been sent
 - Please make sure the appropriate staff are set up to receive notifications
- ONE System Agency Leads can contact the Bitfocus Helpdesk at onesf@bitfocus.com or 415.429.4211 to make any changes

Pending Referrals Tab

- Go to the referrals tab
- Select the pending tab
- Open the referral

[TRAINING] Brilliant Corners

SEARCH CASELOAD REFERRALS

Ja Guerrero Huh, [TRAINING] Brilliant Corners

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

Pending Referrals

Search: _____ Mode: Standard

Sort By: Default Characteristic: -- Select --

Eligible Clients Only SEARCH

Client	Referral Date	Qualified	Days Pending
Charles Smith Program: Brilliant Corners-Flexible Housing Subsidy Pool Under 60-Prop C Referred by: [TRAINING] Brilliant Corners	04/05/2021	Reassigned	318 total 0 pending 315 in process
Jane Doe Program: Brilliant Corners-Flexible Housing Subsidy Pool Under 60-Prop C Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency	10/19/2021	No	122 total 122 pending
Lisa Simpson Program: Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency	02/17/2022	Reassigned	1 total 0 pending

1 Pending
1 Completed

Pending – In Process

- Change referral status from pending to pending in process
- Referral color will change to green when status is changed to in process.

REFERRAL: EDIT

Client	Lisa Simpson
Referred Program	Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C
Referred to Agency	[TRAINING] Brilliant Corners
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	02/17/2022 7:42 AM
Days Pending	1 day(s)
In Process	0 day(s)
Qualified	Reassigned
Referred by Staff	Ja Guerrero Huh ⓘ
Case Manager	Select
Last Activity	02/17/2022 CHECK-IN
Status	Pending - In Process
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL

Agency ⓘ

Lisa Simpson
Program: Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C
Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ

📅 02/17/2022 Reassigned

1 total
0 pending
0 in process

Referrals

- Notifications
 - Pending referral notification sent every 7 days if referral status isn't changed
 - In Process referral notification sent every 14 days if status isn't changed
- Referral Threshold
 - Referrals sent back to the Community Queue in 90 days if referral status isn't changed

Referral Denial

- If you need to deny a referral: please contact your HSH program manager for clarification

Status	Denied <input type="button" value="v"/>
Send to Community Queue	Yes <input type="button" value="v"/>
Denied By Type	<u>Provider</u> <input type="button" value="v"/>
Denied Reason	Denied by Landlord/Property Manager <input type="button" value="v"/>
Denial Information	<input type="text"/>

Accepting a Referral

- To accept a referral, enroll the client into the program providing housing navigation
- The enrollment needs to be linked to the referral

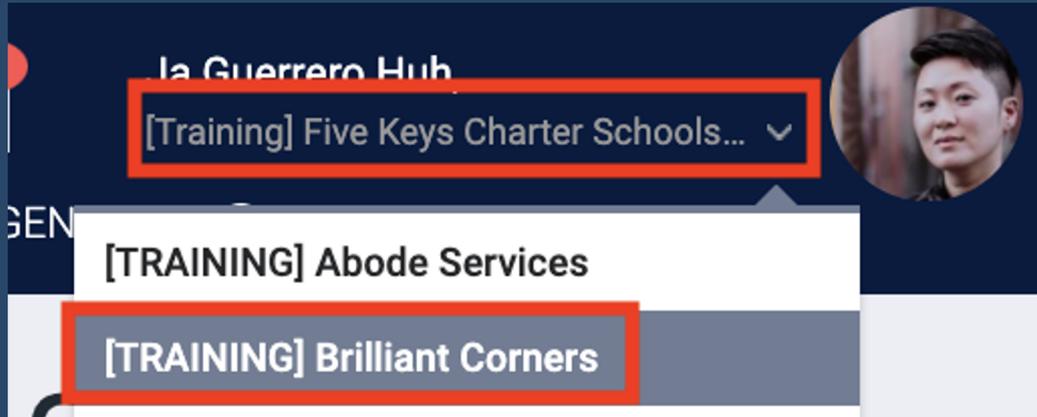
The screenshot shows a web interface for managing referrals. At the top, there is a header bar with a dropdown menu showing 'Households without children' and a status indicator '20 Beds in 20 Units'. Below this, a central orange box displays '1 pending referral(s). Oldest 18 days.' To the left, there is a toggle switch labeled 'Program Placement a result of Referral provided by [TRAINING] System', which is currently turned on. At the bottom left, there is a 'PRINT DIRECTIONS' button with a printer icon. At the bottom right, there is a dark blue 'ENROLL' button.

Switching Agencies



Switching Agencies

- ▶ Switch agencies by clicking the dropdown arrow under your name.



Program Enrollment



PROGRAMS: AVAILABLE

Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C

PROGRAM DESCRIPTION:
This program is Cat B and Over 60.



Funding Source
Local or Other Funding Source

Availability
Full Availability

Service Categories:

- No Category
- Coordinated Entry Event
- Case Management
- Housing Search and Placement

HOUSING AVAILABILITY:

Households without children

200 Beds in 200 Units

Program Placement a result of Referral provided by [TRAINING] San Francisco Adult Coordinated Entry Agency

1 pending referral(s). Oldest 5 days.

PRINT DIRECTIONS

ENROLL

Program Enrollment

- Project start date is the date client enrolled into housing navigation services
- Leave housing move-in date information blank for now

Information to be completed when client moves into permanent housing

- Please note that the housing move-in date should not be before the program enrollment date
- Client's information may cascade forward so double check to see that previously collected information is up to date

Lisa Simpson

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Enroll 'Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C' program for client Lisa Simpson

Program Date 02/21/2022 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 

Unit Number

Address

City

Zipcode

Is this a shared housing destination?

PRIOR LIVING SITUATION

Type of Residence Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

Length of Stay in Prior Living Situation Two to six nights

Approximate Date Homelessness Started 08/01/2021 

Number of times on the streets, in ES, or Safe Haven in the past three years Three Times

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years Two Months

Program Enrollment

- Project start date is the date client enrolled into housing navigation services
- Leave housing move-in date information blank for now

Information to be completed when client moves into permanent housing

- Client's information may cascade forward so double check to see that previously collected information is up to date

Lisa Simpson

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Enroll 'Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C' program for client Lisa Simpson

Program Date	02/21/2022	
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT		
Housing Move-In Date	02/22/2022	
Unit Number	1	
Address	401 Turk Street	
City	San Francisco	
Zipcode	94102	

Care Team

- The Care Team includes all staff added during a client's enrollment and added to the client's profile
- Navigate to client profile > Care Team > Manage

Care Team 3

Manage

SH SP 

CARE TEAM MANAGEMENT

ADD CARE TEAM MEMBER +

Active Care Team

Care Team Member	Type	Start Date	End Date
Ja Guerrero Huh [TRAINING] Abode Services	Enrollment	06/07/2021	

Services



Client Level Services



Rehousing Policy Category B and C Services (Flex Pool and RRH)

- Category B and C Services
 - Extenuating Circumstance
 - Outreach for Batch Prioritization
 - Outreach to Sign Rehousing Policy

Lisa Simpson

PROFILE HISTORY **SERVICES** PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

SERVICES

Extenuating Circumstance	Coordinated Entry Event ▾
Outreach for Batch Prioritization	Coordinated Entry Event ▾
Outreach to Sign Rehousing Policy	Coordinated Entry Event ▾

Services

- Services document
 - Client assistance
 - Client engagement
 - Document the housing search and move in process
 - Show client activity in a program
 - Inform other users in the system of client's status
- Notes can be entered within a service but does not have to be entered

Category B and C Services

Client Housing Appointment Outcome

- Client Refused Housing Outcome

Housing Search

Housing Search Hold

Successful Connection to Community Resources

The screenshot shows a web interface for a client named Lisa Simpson. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a highlighted box contains the text 'PROGRAM: BRILLIANT CORNERS - FLEXIBLE HOUSING SUBSIDY POOL OVER 60-PROP C'. A secondary navigation bar includes 'Enrollment', 'History', 'Provide Services' (highlighted), 'Assessments', 'Notes', 'Files', 'Forms', and 'X Exit'. The main content area is titled 'Services' and contains a table with the following items:

Client Housing Appointment Outcome	Coordinated Entry Event ▾
Client Refused Housing Option	Coordinated Entry Event ▾
Housing Search	Housing Search and Placement ▾
Housing Search Hold	Housing Search and Placement ▾
Successful Connection to Community Resources	Case Management ▾

Category B and C Services

- Click the program tab
- Open the program enrollment
- Click provide service
- Click the drop down next the service provided
- Enter the date the service was provided
- Add service note as needed

The screenshot displays a user interface for Lisa Simpson. At the top, the name 'Lisa Simpson' is shown. Below it is a navigation menu with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Underneath the navigation is a header for the selected program: PROGRAM: BRILLIANT CORNERS - FLEXIBLE HOUSING SUBSIDY POOL OVER 60-PROP C (also highlighted with a red box). Below this is another set of tabs: Enrollment, History, Provide Services (highlighted with a red box), Assessments, Notes, Files, and Forms. The main content area is titled 'Services' and contains a form for 'Client Housing Appointment Outcome' (Coordinated Entry Event). The form has a section titled 'Notice Left for Client' with an 'Event Date' field set to 03/01/2022 and a 'Service Note' text area with a rich text editor toolbar. A 'SUBMIT' button is located at the bottom right of the form.

Services Definition

Client Housing Appointment Outcome: use this when a client misses a pre-scheduled housing appointment without any documented extenuating circumstance

- **Client Refused Housing Outcome:** use this to document when a client refuses a unit
- **Housing Search:** Supporting the referral through search of a home in the private rental market.
- **Housing Search Hold:** When a referral is in the housing search process and encounters barriers to housing that places the housing search process on hold. Note that a corresponding Extenuating Circumstance must also be documented for the client if there is a hold
- *Example: client is admitted into the hospital.*

Successful Connection to Community Resources Service

- Legal Services: Participant was given information about legal service providers like Bay Area Legal Aid
- Food Related: Provider referral to food services or provides a grocery card
- Behavioral Health: Provider shares information about counseling/behavioral health services
- Substance: Provider shares information about substance use counseling services
- Public Benefits: if you support a participant in applying for benefits or refer them to benefit services. This can include phone calls to public benefit offices.
- Faith Based/Community Organization: Information given to participant on places of worship and other community organizations
- IHSS/In Home care: Provider gives participant information about county or private in-home care services

Community Resources Continued

- Medical Care: Health care service information shared with participant
- Money Management Services: Referral to services budgeting and/or credit counseling services
- Workforce Development/Training: Referral to workforce services like Goodwill and/or training providers
- Assistance with Rental/Utilities Arrears: Information provided to client for services that assist with back rent and past due utility bills like Eviction Defense Collaborative
- Other (note: DV is included here): Any other referral or information provided to client for community services that aren't listed, this will also include domestic violence services

Notes



Notes

- In the event that services doesn't capture action accurately, providers are encouraged to use notes to explain details related to client interaction, referrals and all other program level data tracking

Notes

- Notes are entered under the notes tab
- Notes allow for information to be shared with other users
- Notes are entered when there is no applicable service to record
- Notes > Add note > Save changes

The screenshot displays the Bitfocus user interface for a client named Lisa Simpson. At the top, the name 'Lisa Simpson' is shown. Below it is a navigation menu with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, **NOTES**, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. The 'NOTES' tab is highlighted with a red box. Below the navigation is a section titled 'CLIENT NOTES' with an 'ADD NOTE +' button on the right, also highlighted with a red box. The main content area is empty, showing a faint illustration of a stack of papers and the text 'No results found' at the bottom.

Housing Move-in Date



Housing Move-in Date

- Click on programs tab and open the program enrollment
- Select enrollment
- Update housing move-in date, address, and shared housing
- Save

Lisa Simpson

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: BRILLIANT CORNERS - FLEXIBLE HOUSING SUBSIDY POOL OVER 60-PROP C

Enrollment History Provide Services Assessments Notes Files Forms

Enroll Program for client Lisa Simpson

Program Date 02/22/2022 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-in Date 02/25/2022 

Unit Number 101

Address 260 Golden Gate Ave

City San Francisco

Zipcode 94102

Annual Assessments



Annual Assessments

- Open program enrollment
- Select program level assessment
- Select annual assessment
- Add annual assessment
- Save and close

Lisa Simpson

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: BRILLIANT CORNERS - FLEXIBLE HOUSING SUBSIDY POOL OVER 60-PROP C

Enrollment History Provide Services **Assessments** Notes Files Forms × Exit

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START

Program Exit



Program Exit

- Edit program
- Choose exit
- Enter exit date and destination
- Review cascaded information
- Save and close

PROGRAM: ABODE SERVICES-RAPID REHOUSING-PROP C

Enrollment History **Provide Services** Assessments Notes Files Forms X Exit

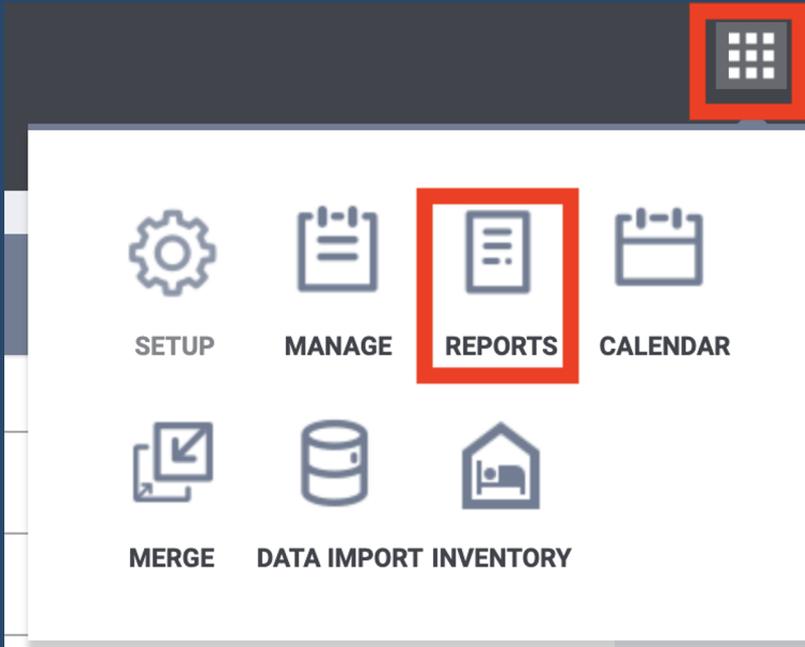
Services

Housing Search	Housing Search and Placement ▼
Housing Search Hold	Housing Search and Placement ▼
Successful Connection to Community Resources	Case Management ▼
Unsuccessful Housing Referral	Housing Search and Placement ▼

Reports



Helpful Reports



SETUP MANAGE **REPORTS** CALENDAR

MERGE DATA IMPORT INVENTORY

Community and Referrals 8 report(s) ^

[GNRL-401] VI-SPDAT Details	★ RUN SCHEDULE MORE INFO ▾
[RFRL-102] Referral Outcomes Statistics	★ RUN SCHEDULE
[RFRL-103] Referral Statistics - Inbound	★ RUN SCHEDULE MORE INFO ▾
[RFRL-104] Referral Statistics - Outbound	★ RUN SCHEDULE MORE INFO ▾

Program Based Reports 20 report(s) ^

[EMPL-101] Employment Report	★ RUN SCHEDULE MORE INFO ▾
[EMPL-102] Employment / Education Report	★ RUN SCHEDULE MORE INFO ▾
[EXIT-101] Potential Exits	★ RUN SCHEDULE MORE INFO ▾
[EXPS-103] Program Funding Source Financial Detail	★ RUN SCHEDULE MORE INFO ▾
[GNRL-105] Program Participation Summary	★ RUN SCHEDULE MORE INFO ▾
[GNRL-106] Program Roster	★ RUN SCHEDULE MORE INFO ▾
[GNRL-115] Length of Stay at Prior Living Situation Comparison	★ RUN SCHEDULE

Solutions to Common Problems



Solutions to Common Problems

- Client is enrolled but still showing up pending tab
 - Enrollment wasn't linked to the referral. Contact the Help Desk to connect the referral
- If program is correctly linked to the referral, the program history will include the referral link

Lisa Simpson

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

HISTORY

Advanced search options View ▾

Service Name	Start Date	End Date	
 Brilliant Corners - Flexible Housing Subsidy Pool Over 60-Prop C [TRAINING] Brilliant Corners ⓘ	02/22/2022	Active	

Resources



Resources

Bitfocus Help Desk

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

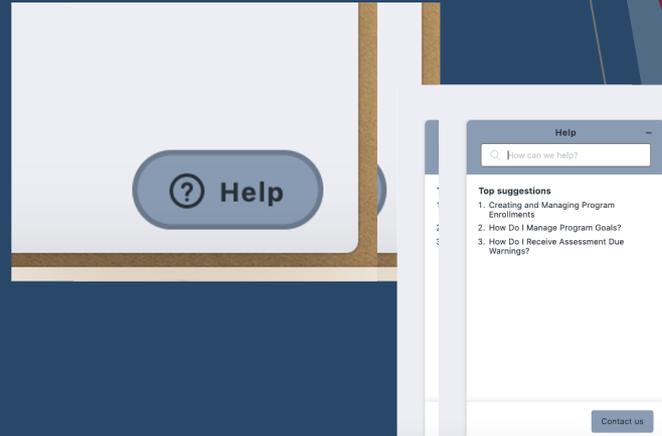
Bitfocus Community Administration

Onesf-admin@bitfocus.com

ONESF Help Center Web Page

<https://onesf.bitfocus.com>

The Help Desk Widget



Questions

