

Category B and C ONE System Training



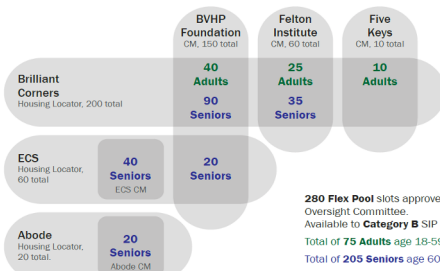
Agenda

- 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

Flex Pool Expansion Partnerships: Phases 1 and 2

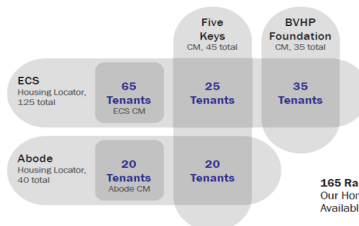


280 Flex Pool slots approved by the Our City, Our Home Oversight Committee.
Available to **Category B** SIP guests in phases 1 and 2.
Total of **75 Adults** age 18-59
Total of **205 Seniors** age 60+

For Housing Locators in Flex

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

Rapid Rehousing Expansion Partnerships: Phases 1 and 2



165 Rapid Rehousing slots approved by the Our City, Our Home Oversight Committee.
Available to **Category C** SIP guests in phases 1 and 2.

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

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	▼
Send to Community Queue	Yes	▼
Denied By Type	Provider	▼
Denied Reason	Denied by Landlord/Property Manager▼	
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

► Households without children

20 Beds in 20 Units

1 pending referral(s). Oldest 18 days.

☒ Program Placement a result of Referral provided by [TRAINING] System

 PRINT DIRECTIONS

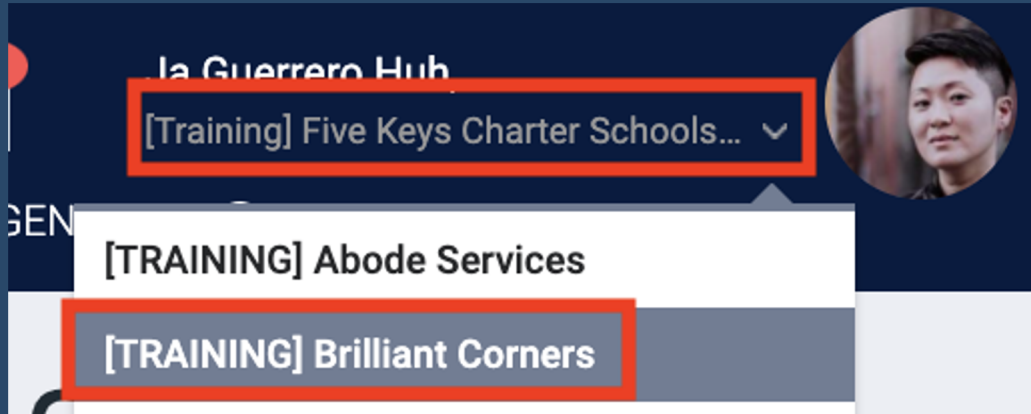
ENROLL

Switching Agencies



Switching Agencies

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



Program Enrollment



Lisa Simpson

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

PROGRAMS: AVAILABLE

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

PROGRAM DESCRIPTION:

This program is Cat B and Over 60.

Active Clients



■ 0 % Families
■ 100 % Individuals

Occupancy (Today)



■ 1 % Checked In
■ 0 % Reserved
■ 100 % Available

Referrals (90 Days)



■ 100 % Referrals Pending
■ 0 % Referrals Connected
■ 0 % Referrals Denied



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



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

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 X Exit

Services

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 the Bitfocus web application interface for a user named Lisa Simpson. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a sub-header indicates the selected program: PROGRAM: BRILLIANT CORNERS - FLEXIBLE HOUSING SUBSIDY POOL OVER 60-PROP C (also highlighted with a red box). The main content area features a secondary navigation bar with links for Enrollment, History, Provide Services (highlighted with a red box), Assessments, Notes, Files, and Forms. The 'Services' section is active, showing a form titled 'Client Housing Appointment Outcome' with a dropdown menu set to 'Coordinated Entry Event'. The form includes a 'Notice Left for Client' section with an 'Event Date' field set to 03/01/2022 and a 'Service Note' text area with formatting icons (B, I, link, unlink). 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

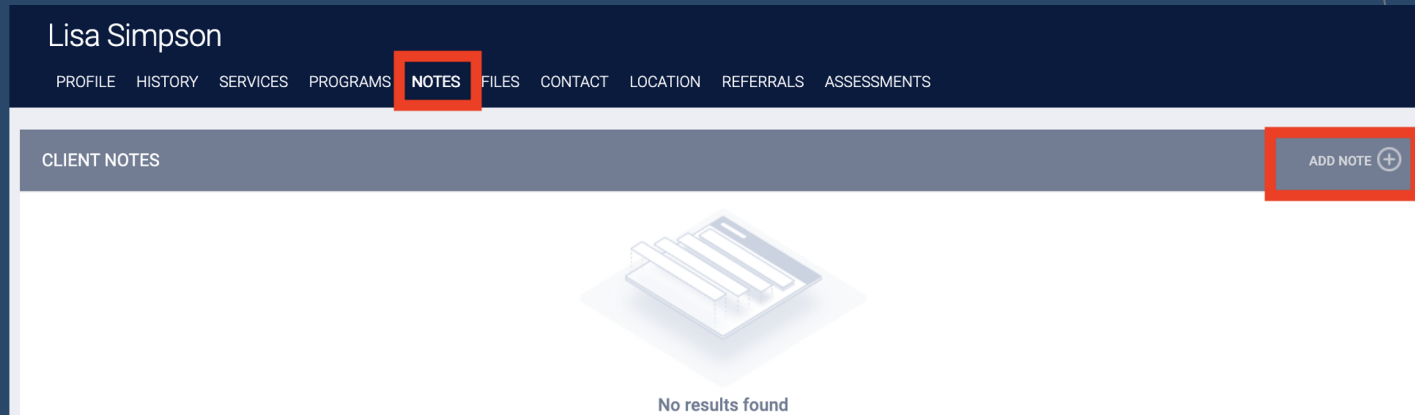
Notes

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



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 ✕ Exit

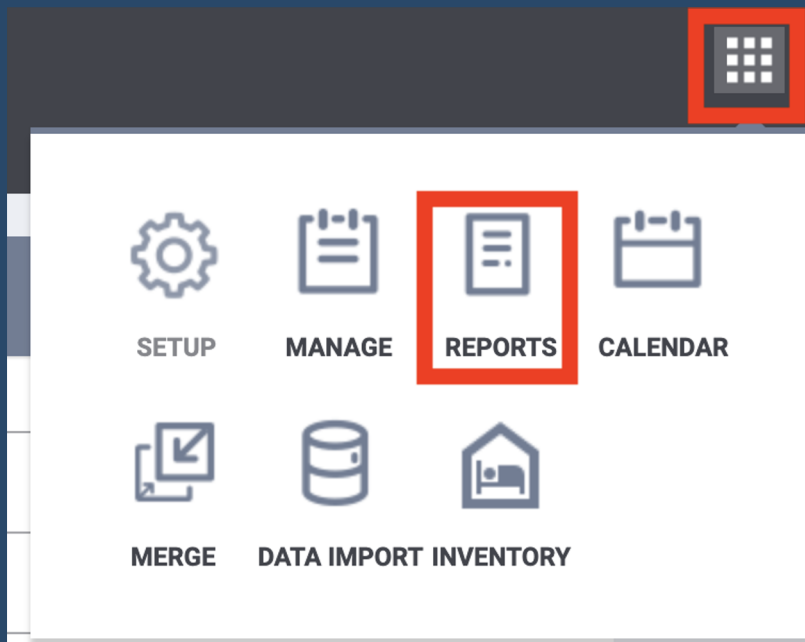
Services

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



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

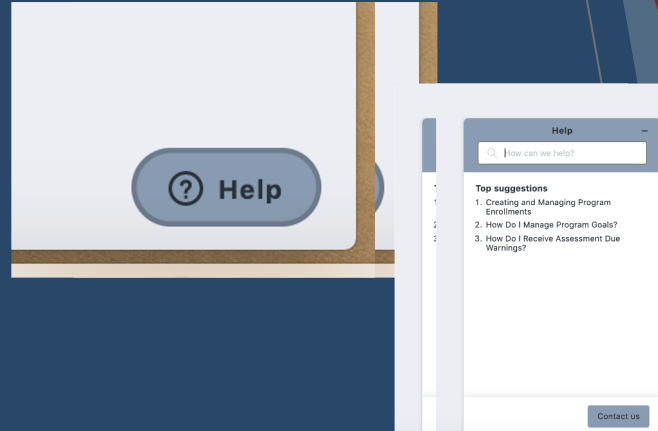
Bitfocus Community Administration

Onesf-admin@bitfocus.com

ONESF Help Center Web Page

<https://onesf.bitfocus.com>

The Help Desk Widget



Questions