Category C and D ONE System Training

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Agenda

- Welcome

- Referrals

- Program Enrollment

- Services

- Notes

- Housing Move-in Date

- Program Exit

- Reports

- Solutions to Common Problems

- Resources

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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

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Pending Referrals Tab

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

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.

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

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Denying a Referral

- Indicate referral denial as soon as possible

- Select referral denial reason and add additional denial information note

- Always send the client back to the Community Queue unless the client is deceased, housed, or out of jurisdiction

Status	Denied
Send to Community Queue	Yes
Denied By Type	Provider
Denied Reason	Denied by Landlord/Property Manager
Denial Information	

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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

Program Enrollment

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

Enroll Program for client Jerry Seinfeld

Project Start Date   06/08/2021

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

Housing Move-In Date   04/06/2021

Unit Number

Address

City

Zipcode

Is this a shared housing destination?

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
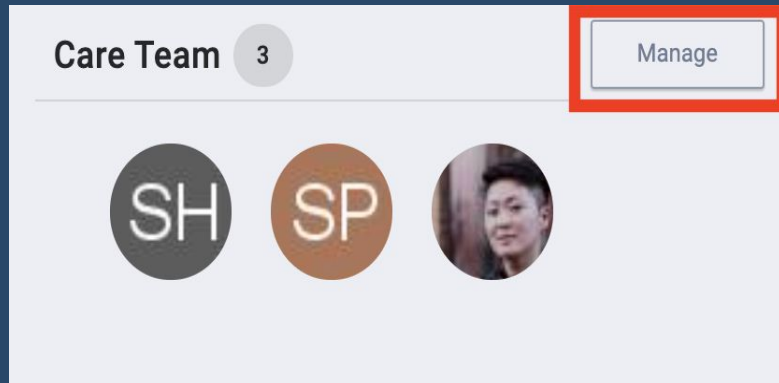
Services

Category C and D Services

- Rehousing Participation Policy Category C and D 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

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Category C and D Services

- **Category C Services:**
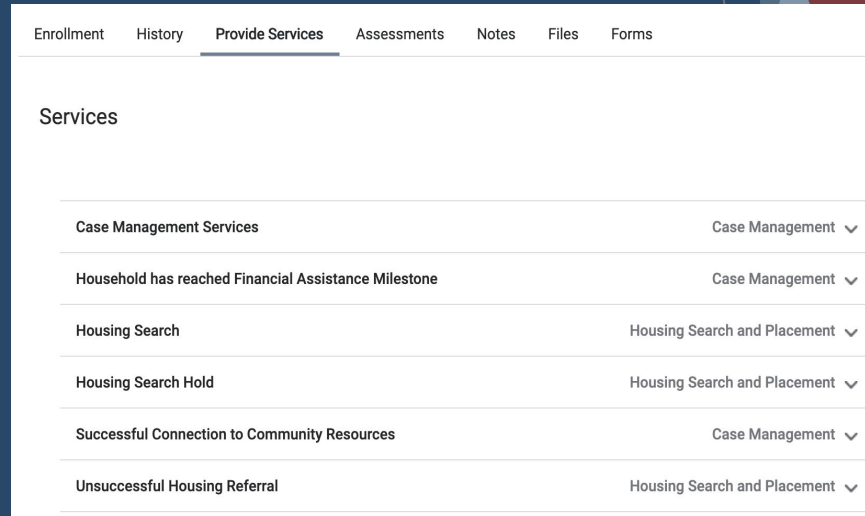 - Housing Search
  - Housing Search Hold
  - Successful Connection to Community Resources

- **Category D Services:**
  - Case Management Services
  - Household has reached Subsidy Milestone
  - Housing Search
  - Housing Search Hold
  - Successful Connection to Community Resources

* Unsuccessful Housing Referral Service for Category B, C, and D to roll out a future date

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Category C and D 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

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

Services

Case Management Services	Case Management ⌄
Household has reached Financial Assistance Milestone	Case Management ⌄
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 ⌄

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Housing Services

- Housing Search: Supporting the referral through search of a home in the private rental market.
- Unsuccessful Housing Referral: During the Housing Search when the client views a unit that meets their housing preferences, and the client declines the unit
  - *Training for unsuccessful housing referral tbd*
- 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.
- *Example: client is admitted into the hospital.*

Case Management Services

- In person: Provider interaction with the participant in person
- Phone: Provider interaction with the participant via phone
- Engagement attempt: Provider outreach attempt with participant via phone or in person but provider was unable to complete interaction

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Community Resources

- 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

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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

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Financial Assistance Milestone Service

- Household has reached Financial Assistance Milestone
- Note: Data team internally sends report to Kate's team *and* enters milestone in ONE

Job Screener Pilot Assessment

- Client level employment assessment that uses three questions to gauge the participant's interest in workforce services
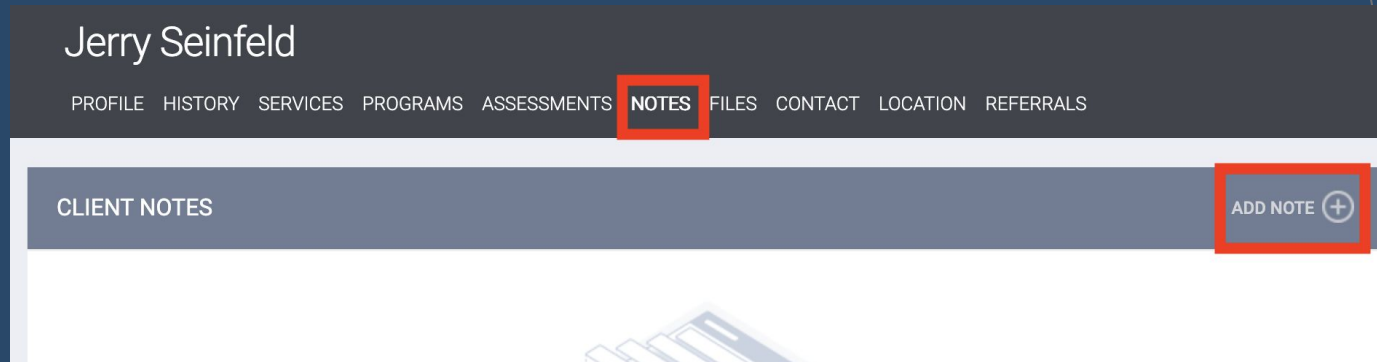
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Notes

- 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

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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

Jerry Seinfeld

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

CLIENT NOTES   ADD NOTE ⊕

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

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?

Program Exit

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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
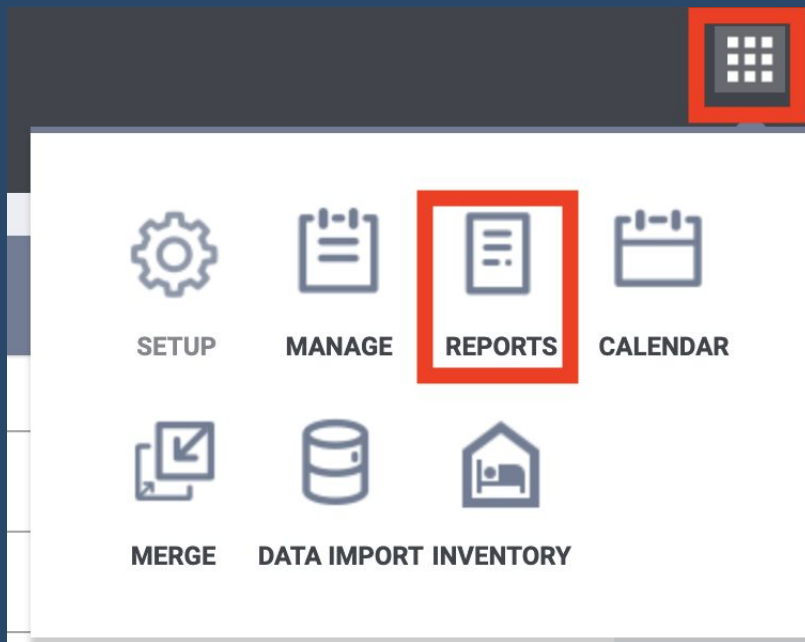
Services

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

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Helpful Reports

Solutions to Common Problems

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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

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