

Category C and D ONE System Training



Agenda

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



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

The screenshot displays the [TRAINING] Aboode Services web application. The top navigation bar includes a search icon, a CASELOAD button, and a REFERRALS button (highlighted with a red box). The user profile shows Ja Guerrero Huh, [TRAINING] Aboode Services. The main navigation menu has tabs for Dashboard, Pending (highlighted with a red box), Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. The Pending Referrals section includes search filters: Search (text input), Mode (Standard), Sort By (Default), and Characteristic (-- Select --). There is also an 'Eligible Clients Only' toggle and a SEARCH button. A table lists pending referrals, with one entry highlighted by a red box:

Client	Referral Date	Qualified	Days Pending
Jerry Seinfeld Program: Aboode Services-Rapid Rehousing-Prop C Referred by: [TRAINING] System	05/21/2021	Reassigned	18 total 0 pending

On the right side, a donut chart shows 1 Pending 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.

Client	Jerry Seinfeld
Referred Program	Abode Services-Rapid Rehousing-Prop C
Referred to Agency	[TRAINING] Abode Services
Referring Agency	[TRAINING] System
Referred Date	05/21/2021 12:54 AM
Days Pending	18 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	84
Referred by Staff	Ja Guerrero Huh
Case Manager	<div><div>Pending</div><div>✓ Pending - In Process</div><div>Denied</div><div>Expired</div></div>
Last Activity	
Status	<div>Pending - In Process</div>

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
Jerry Seinfeld Program: Abode Services-Rapid Rehousing-Prop C Referred by: [TRAINING] System	05/21/2021	Reassigned	18 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

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	<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


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

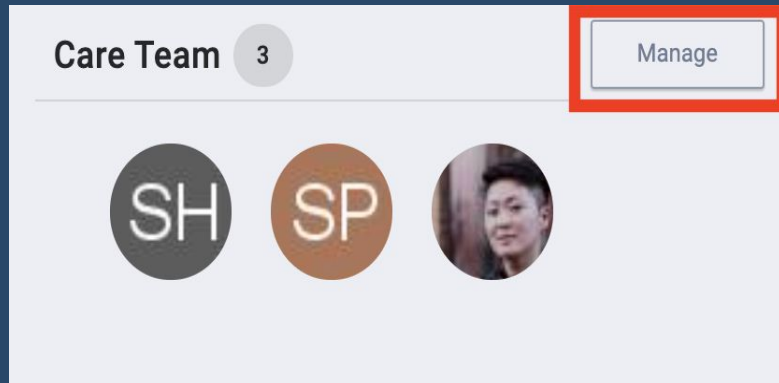
City

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



A screenshot of the 'CARE TEAM MANAGEMENT' interface. At the top right is a button labeled 'ADD CARE TEAM MEMBER' with a plus icon, highlighted with a red rectangular border. Below this is a section titled 'Active Care Team'. A table lists the active care team members.

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

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

Category C and D Services

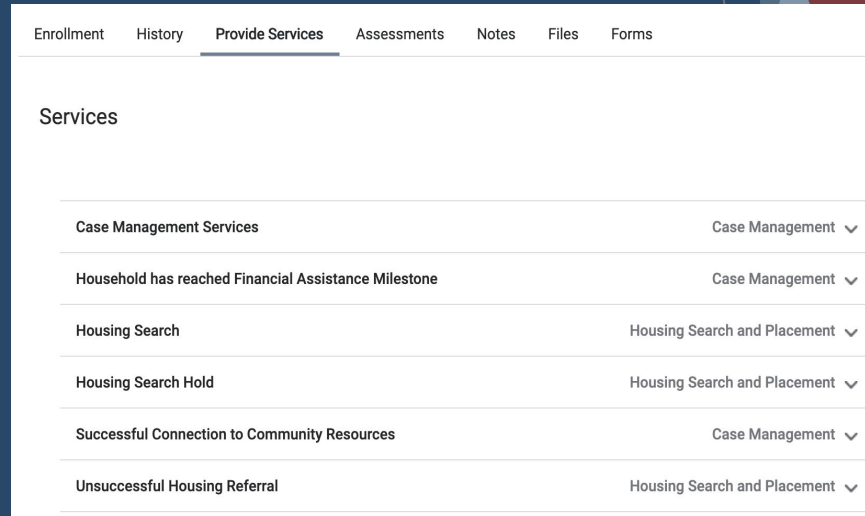
- **Category C Services:**
 - Housing Search
 - Housing Search Hold
 - Successful Connection to Community Resources
- **Category D Services:**
 - Case Management Services
 - Household has reached Subsidy Milestone
 - Housing Search
 - Housing Search Hold
 - Successful Connection to Community Resources

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



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



The screenshot shows a web application interface with a top navigation bar containing the following tabs: Enrollment, History, Provide Services (which is the active tab), Assessments, Notes, Files, and Forms. Below the navigation bar, the main content area is titled 'Services'. It contains a table with six rows, each representing a service type. Each row has a text label on the left and a dropdown menu on the right, all enclosed in a light gray border.

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 ▼

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

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

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

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

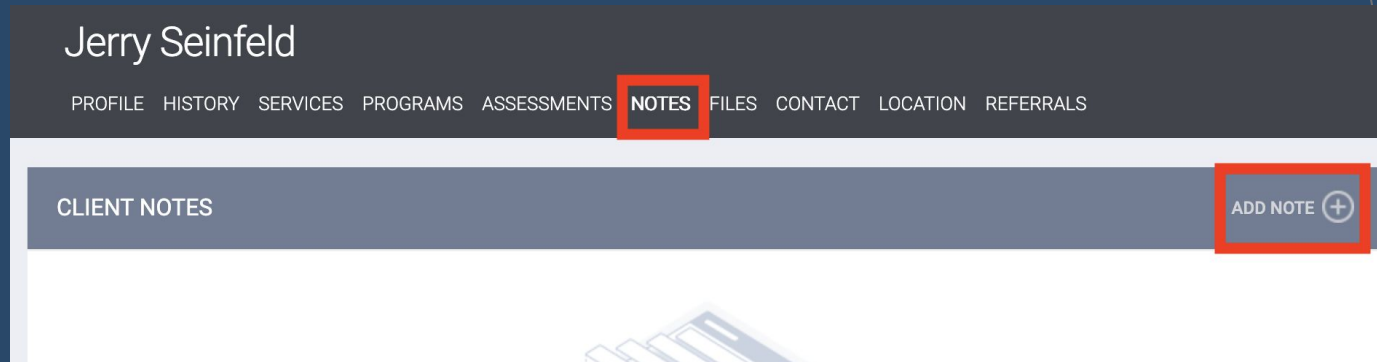
Notes

- 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

- 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 interface for a client named Jerry Seinfeld. At the top, a dark grey header contains the client's name. Below it, a horizontal menu lists several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The 'NOTES' tab is highlighted with a red rectangular box. Below the menu, a light blue bar labeled 'CLIENT NOTES' spans the width of the content area. On the right side of this bar, there is a button labeled 'ADD NOTE' with a plus icon, which is also highlighted with a red rectangular box. The main content area below the 'CLIENT NOTES' bar is currently empty, showing a faint background image of a document.


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

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

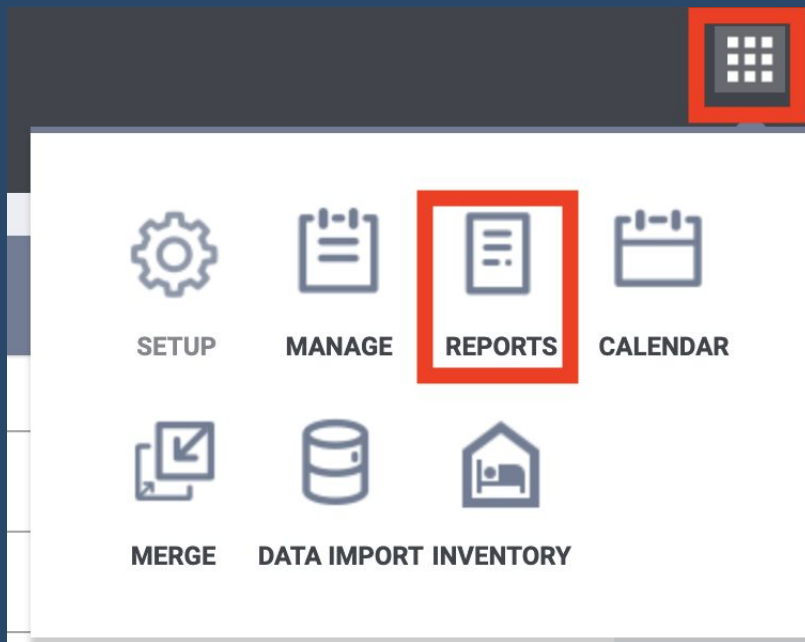
Services

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

Advanced Search Options View ▾		
Service Name	Start Date	End Date
  Abode Services - Flexible Housing Subsidy Pool Over 60 - Prop C [TRAINING] Abode Services ⓘ	06/07/2021	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

