

# 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



# 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](mailto: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] Abode Services

Ja Guerrero Huh, [TRAINING] Abode Services

SEARCH CASELOAD REFERRALS

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
<b>Jerry Seinfeld</b> Program: Abode Services-Rapid Rehousing-Prop C Referred by: [TRAINING] System	05/21/2021	Reassigned	18 total 0 pending

# 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 style="border: 2px solid red; padding: 2px;"><ul style="list-style-type: none"><li>Pending</li><li>✓ Pending - In Process</li><li>Denied</li><li>Expired</li></ul></div>
Last Activity	
Status	<u>Pending - In Process</u>

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
<b>Jerry Seinfeld</b> 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

The screenshot shows a software 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.

# 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  

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?

# 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



# 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

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 ▼

# 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 user interface for Jerry Seinfeld's profile. At the top, the name "Jerry Seinfeld" is shown. Below it is a navigation menu with the following items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, **NOTES**, FILES, CONTACT, LOCATION, and REFERRALS. The "NOTES" tab is highlighted with a red box. Below the navigation menu is a section titled "CLIENT NOTES". On the right side of this section, there is a button labeled "ADD NOTE +" with a plus sign icon, which is also highlighted with a red box. The background of the interface is dark blue with a white sidebar on the right.

# 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 X Exit

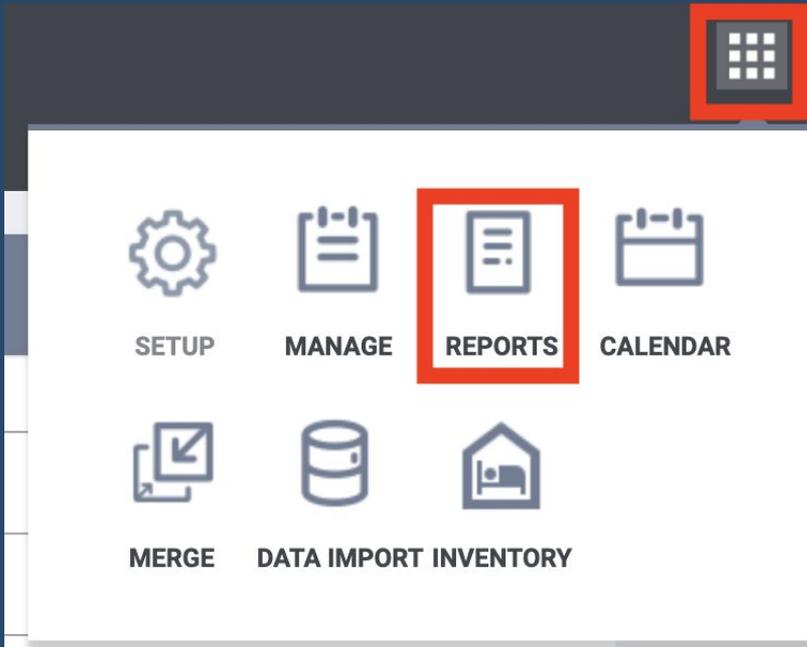
Services

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



Community and Referrals 8 report(s) ^

[GNRL-401] VI-SPDAT Details	★    RUN    SCHEDULE   MORE INFO ^
[RFRL-102] Referral Outcomes Statistics	★    RUN    SCHEDULE
<b>[RFRL-103] Referral Statistics - Inbound</b>	★    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 ^
<b>[GNRL-106] Program Roster</b>	★    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](mailto:onesf@bitfocus.com) or (415) 429-4211

## Bitfocus Community Administration

[Onesf-admin@bitfocus.com](mailto:Onesf-admin@bitfocus.com)

## ONESF Help Center Web Page

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

## The Help Desk Widget

