Access Roles

This document outlines ONE System Access Roles. Access Roles have been determined based on the staff roles, maintaining client privacy and access to ONE functionality needed to do each job. **ONE System Access Roles do not necessarily correlate with internal staff titles, please review functionality carefully to determine the best role(s) for your user(s). To request a change in access roles for a user, agency leads should contact the help desk at onesf@bitfocus.com. For any questions about access roles, contact onesf-admin@bitfocus.com.**

ACCESS ROLE NAME	ACCESS ROLE FUNCTIONALITY
Front Line Staff	This access role has the most limited functionality. Users with this access role are typically Front Line Staff working at a desk or reception area in a program or housing site. Front Line Staff will have the ability to view the client profile page, services and location.
VSP (Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential)	VSP will have the ability to see the client profile page, history, report library and cannot enter any data into ONE. This access role has the most limited functionality.
Property Managers	This is a very restricted access role, usually for users who work in property management and manage openings for a housing portfolio.
Shelter Staff	Users with this access role may need to enter shelter reservation information in ONE. Staff will have limited access to client information. They will have the same access as Front Line Staff and VSP, with the additional ability to view the programs tab, run reports and use the attendance tool.
Shelter Staff + Client Referrals	This access role has the same level of functionality as the **Shelter Staff** access role, but also has access to program referrals.
Shelter Case Manager	This access role is for users who will be providing case management/direct services to clients staying in a shelter. Staff will be able to access all client level information except the assessment tab. This access role has the ability to run reports and use the attendance tool.
Shelter Case Manager + Client Referrals	This access role has the same level of functionality as the **Shelter Case Manager** access role, but also has access to program referrals.
Housing Program Manager	Housing staff in this role may be responsible for posting open units, processing housing referrals (accepting or denying the referral). Staff will be able to access all client level information except the assessment tab. Please note that if staff complete Annual Assessments (or oversee programs that

Updated: 06/17/2022

	require Annual Assessments), please request the **Housing Case Management** access role.
Program Supervisor (non-housing program) **Access Partner**	This access role is designed for staff who need access to run reports, monitor data quality and see client level information. This is intended for supervisors or access partners who do not oversee housing programs and who do not need access to referral information.
Street Outreach **SFHOT Navigator**	These access roles are able to see all client level information for ease of care coordination and connection to Coordinated Entry.
Agency Lead **Agency Lead Data** **Back-up Agency Lead**	These access roles have the least restrictive access in ONE. It is designated for staff that have access to all client level information, referrals and may need matchmaking functionality. Users in this role may need access to information entered by agencies other than their own for purposes of Coordinated Entry. **Agency Lead Data** users will have access to save data analytics information.
Access Point Staff **Access Point Manager/ Vets BNL Agency Manager** **Housing Case Management**	These access roles have the least restrictive access in ONE. It is designated for staff that have access to all client level information, referrals and may need matchmaking functionality. Users in this role may need access to information entered by agencies other than their own for purposes of Coordinated Entry. Users with these access roles may have data analytics information.
Navigation Case Management (Assessment) (Navigation Centers only)	This access role has the least restrictive access in ONE. It is designated for staff that have access to all client level information, referrals and may need matchmaking functionality.
HSH Analyst* **HSH Staff*** **HSH Matchmaking*** *** Only for HSH Staff**	These access roles have the least restrictive access in ONE. It is designated for staff that have access to all client level information, referrals and may need matchmaking functionality Users will have access to data analytics information. **HSH Analyst** users will have access to save data analytics information.

Updated: 06/17/2022

Access Roles

The following chart is a visualization of the Access Roles and the functions in ONE System they will have permissions to view and/or use.

Access Role	ONE Functions										
	Client Profile	History	Services	Programs	Assessments	Notes	Files	Location	Referrals	Reports	Data Analysis
Front Line Staff	x		x					x			
VSP	x	x	x	x	x		x			x	x
Property Managers	x			x			x		x		
Shelter Staff	x		x	x						x	
Shelter Staff + Client Referrals	x		x	x					x	x	
Shelter Case Manager	x	x	x	x		x	x	x		x	
Shelter Case Manager + Client Referrals	x	x	x	x		x	x	x	x	x	
Housing Program Manager	x	x	x	x		x	x	x	x	x	
Program Supervisor	x	x	x	x	x	x	x	x		x	
Access Partner	x	x	x	x	x	x	x	x		x	
Street Outreach	x	x	x	x	x	x	x	x		x	
SF HOT Navigator	x	x	x	x	x	x	x	x		x	
Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Agency Lead Data	x	x	x	x	x	x	x	x	x	x	x
Back-up Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Access Point Staff	x	x	x	x	x	x	x	x	x	x	x
Access Point Manager/Vets BNL Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Housing Case Management	x	x	x	x	x	x	x	x	x	x	x
Navigation Case Management (Assessment)	x	x	x	x	x	x	x	x	x	x	x
HSH Analyst*	x	x	x	x	x	x	x	x	x	x	x
HSH Staff*	x	x	x	x	x	x	x	x	x	x	x
HSH Matchmaking*	x	x	x	x	x	x	x	x	x	x	x
*Only for HSH staff											

Access Roles

The following chart is a visualization of the Access Roles and the potential workflows they may operate in.

Access Role	Program Area												
	Outreach	Shelter	Navigation Centers	Family Shelter	Adult Coordinated Entry	Family Coordinated Entry	Youth Coordinated Entry	Care Coordination	Homelessness Prevention	Rapid Rehousing	Permanent Supportive Housing	Prop C Flex Pool and RRH Case Management	SFHOT Stabilization Room
Front Line Staff		x											
VSP	Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential can request this access role												
Property Managers										x	x		
Shelter Staff		x											
Shelter Staff + Client Referrals		x	x										
Shelter Case Manager		x											
Shelter Case Manager + Client Referrals		x	x										
Housing Program Manager										x	x		
Program Supervisor		x											
Access Partner								x					
Street Outreach	x												x
SF HOT Navigator													
Agency Lead	x	x	x	x	x	x	x		x	x	x	x	x
Agency Lead Data	x	x	x	x	x	x	x		x	x	x	x	x
Back-up Agency Lead	x	x	x	x	x	x	x		x	x	x	x	x
Access Point Staff					x	x	x						
Access Point Manager/ Vets BNL Agency Manager					x	x	x						
Housing Case Management		x							x	x	x		
Navigation Case Management (Assessment)			x										
HSH Analyst*	x	x	x	x	x	x	x	x	x	x	x	x	x
HSH Staff*	x	x	x	x	x	x	x	x	x	x	x	x	x
HSH Matchmaking*	x	x	x	x	x	x	x	x	x	x	x	x	x
*Only for HSH staff													

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