

## 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](mailto:onesf@bitfocus.com). For any questions about access roles, contact [onesf-admin@bitfocus.com](mailto:onesf-admin@bitfocus.com).

ACCESS ROLE NAME	ACCESS ROLE FUNCTIONALITY
<b>311/CAAP</b> (Only agencies 311 and HSA-CAAP may request this role)	This access role is granted to 311 and CAAP users with the purpose to grant the ability to make referrals to shelter. Users with this role will have limited access to the system.
<b>VSP</b> (Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential may request this role)  <b>Client Lookup – View Only</b>	These access roles have very restricted access and are designed to give agencies view only access to ONE System data to perform their jobs  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.
<b>Property Manager</b>	This is a very restricted access role, usually for users who work in property management and manage unit inventory for a housing portfolio.
<b>Community Partner</b>	This access role is intended for users who support clients and need to run reports, monitor data quality and see client level information, but do not need access to assessments.
<b>Frontline Staff</b>	Users with this access role will have limited access to client information. They will have the same access as VSP, with the additional ability to view the programs tab and run reports.
<b>Program Supervisor + Referrals</b>	This access role is designed for staff who need access to run reports, monitor data quality and see client level information. Users with this role will have the ability to access program referrals.

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<b>Temporary Shelter Case Manager</b>  <b>Temporary Shelter Manager/Director</b>  <b>Family Shelter User</b>	<p>These access roles have the least restrictive access in ONE. They are intended for temporary shelter staff that need a high level of access to client information in ONE, including inventory and program referral access. These roles are not intended for users who need the ability to add and delete reservations in the Attendance tool. Users with the <b>Temporary Shelter Manager/Director</b> or <b>Family Shelter User</b> access roles will have full access to inventory for their agencies.</p>
<b>Shelter User with Attendance</b>	<p>This access roles grant the same access in ONE as the <b>Temporary Shelter Manager/Director</b>, while also granting users the ability to add and delete reservations in the Attendance tool.</p>
<b>Street Outreach</b>  <b>Access Partner</b>	<p>These access roles are designed to give users the ability to see all client-level information for ease of care coordination and connection to Coordinated Entry.</p>
<b>Access Point Staff</b>  <b>Housing Program Manager + Case Management</b>	<p>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.</p>
<b>Agency Lead</b>  <b>Agency Lead - Inventory</b>	<p>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. <b>Agency Lead - Inventory</b> users will have full access to inventory for their agencies.</p>
<b>HSH Staff*</b>  <b>HSH Matchmaking*</b>  * Only for HSH Staff	<p>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.</p>

## Access Roles

The following chart is a visualization of the Access Roles and their specific functions in ONE.

Access Roles	ONE Functions												
	Client Profile	History	Services	Events	Programs	Assessments	Notes	Files	Location	Referrals	Inventory	Reports	Data Analysis
311/CAAP		x			x					x		x	x
VSP	x	x	x		x	x	x	x	x			x	x
Client Lookup - View Only	x	x	x		x	x	x	x	x				
Property Manager	x				x			x		x	x	x	x
Community Partner	x	x	x		x		x	x	x			x	x
Frontline Staff	x		x	x	x				x			x	x
Program Supervisor + Referrals	x	x	x	x	x	x	x	x	x	x		x	x
Temporary Shelter Case Manager	x	x	x		x	x	x	x	x	x	x	x	x
Temporary Shelter Manager/Director	x	x	x	x	x	x	x	x	x	x	x	x	x
Family Shelter User	x	x	x	x	x	x	x	x	x	x	x	x	x
Shelter User with Attendance	x	x	x	x	x	x	x	x	x	x	x	x	x
Street Outreach	x	x	x	x	x	x	x	x	x	x		x	x
Access Partner	x	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	x	x
Housing Program Manager + Case Management	x	x	x	x	x	x	x	x	x	x	x	x	x
Agency Lead	x	x	x	x	x	x	x	x	x	x	x	x	x
Agency Lead - Inventory	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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The following chart is a visualization of the Access Roles and potential workflows in which they may operate.

Access Role	Program Area										
	Outreach	Shelter	Navigation Centers	Family Shelter	Adult Coordinated Entry	Family Coordinated Entry	Youth Coordinated Entry	Homelessness Prevention	Rapid Rehousing	Permanent Supportive Housing	Prop C Flex Pool and RRH Case Management
311/CAAP	Only agencies 311 and HSA-CAAP may request this role										
VSP	Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential may request this access role										
Client Lookup - View Only											
Property Manager									x	x	
Community Partner											
Frontline Staff	x	x									
Program Supervisor + Referrals		x									
Temporary Shelter Case Manager		x	x								
Temporary Shelter Manager/Director		x	x								
Family Shelter User				x							
Shelter User with Attendance		x									
Street Outreach	x				x						
Access Partner	x				x						
Access Point Staff					x	x	x				
Housing Program Manager + Case Management								x	x	x	x
Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Agency Lead - Inventory		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