

# ONE System Agency Lead Meeting

29Jan18

# Agenda

1. How to transfer a caseload when a staff member no longer works at the agency
2. The Agency Leads' role in connecting new users to the ONE System
3. Program Roster Report- Verifying household configuration and number of assessments
4. HMIS Data Quality Report- Addressing Error Counts
5. Annual Housing Inventory Count and Sheltered Count Preparation
6. Review of Data Quality (regular monthly agenda topic)
7. Review User Engagement Dashboard (regular monthly agenda topic)

# Changing Assigned Staff

- ONE System Help Center: [onesf.clarityhs.help](https://onesf.clarityhs.help)
- Article: [How do I reassign a case manager?](#)

The screenshot displays the ONE System interface for a case manager. The user is logged in as Jason Satterfield, Jason Test Agency. The main navigation bar includes PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION, and REFERRALS. The current view is for the program "[HOUSING] AWESOME APARTMENTS". The "Assigned Staff" section shows Jason Satterfield as the assigned staff member, with a red arrow pointing to the "Assigned Staff" label. The "Head of Household" is Sheena Easton IV. The "Program Service History" section shows "There are no results to display".

Sheena Easton IV

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

Jason Satterfield, Jason Test Agency JS

SEARCH CASELOAD

PROGRAM: [HOUSING] AWESOME APARTMENTS

28 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 01/01/2018

Assigned Staff: Jason Satterfield

Head of Household: Sheena Easton IV

Program Group Members +

No active members

Status Assessments +

No statuses

Assessment due every year  
Notification: ON

Enrollment History Provide Services Assessments Notes Files Chart Forms

Program Service History LINK FROM HISTORY

There are no results to display

Managed with Clarity Human Services

# New Users

1. User must complete training, either on-line or in-person. Registration for on-line training will be available through the **ONE SF Help Center**
2. The user must also complete **DPH privacy training**. Bitfocus does not track completion of this training, though the user will self-certify completion when they sign the electronic end user agreement.
3. An ONE System Agency Lead must authorize the user to be set up under their own agency.
4. Bitfocus staff must verify the user has completed a training by **Webinar** or **In-person**.
5. Once training has been verified and user is authorized by an ONE System Agency Lead, Bitfocus staff will create the new user account.