

Agency Lead Meeting

Monday, February 25th, 2019

Welcome!

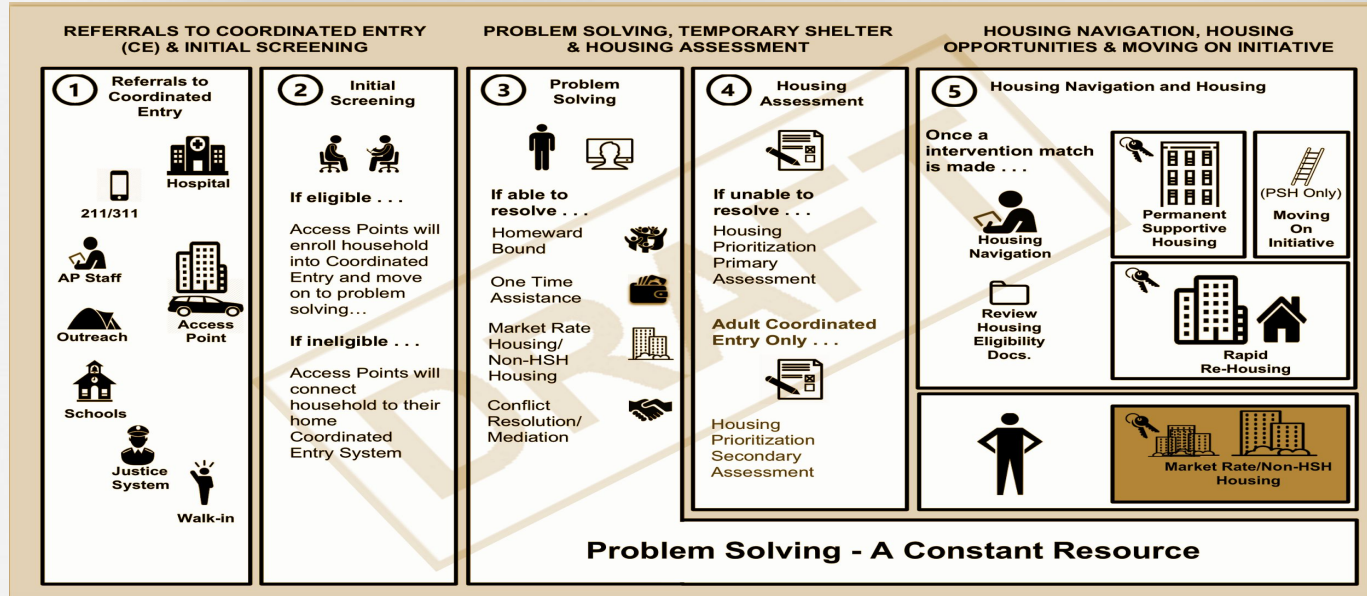
AGENDA

- Training Plan
- Adult Coordinated Entry Roll Out
 - Training Schedule
 - Program Descriptions
 - Access Roles Defined
- Zip Code Clarification
- [CLNT - 127] Homeless Status
Timeline Report
- New Features in ONE System
- Announcements

TRAINING PLAN

- In collaboration with HSH and key partners, Bitfocus provides current information and training about best practices for using the ONE System
- Ongoing training helps to ensure data accuracy, user satisfaction, and high quality client services
- Trainings are being formatted to help facilitate the needs of growing and/or changing staff in a forum that is accessible and practical
 - Pre Recorded trainings
 - Webinars

ADULT COORDINATED ENTRY ROLL OUT



ADULT COORDINATED ENTRY ROLL OUT

Client Engagement

- Client is encountered by outreach workers
- Client goes directly to an access point
- A client profile is created in ONE

Coordinated Entry (CE) Enrollment

- Enrolled into Adult Coordinated Entry Program in ONE
- Enrollments are completed to show clients are being engaged by the CE System

ADULT COORDINATED ENTRY - TRAINING SCHEDULE

*Training Schedule presented during the meeting is postponed

ADULT COORDINATED ENTRY - PROGRAM DESCRIPTIONS

- Program descriptions will be set up in the ONE System for each housing program
- Information will provide Access Point Staff with **detailed description** of each program to assist in matching clients to an eligible program
- Agencies will receive a spreadsheet of all housing programs participating in Adult CE asking them to provide information about their programs including:
 - Visitor Policy
 - Unit Descriptions
 - Building Amenities
 - Contact Information for Referral Notifications-*who should receive notification of referrals, changing of referral status and processing of referral*

ADULT COORDINATED ENTRY - ACCESS ROLES DEFINED

- HSH has determined the various **Access Roles** and parts of the ONE System each **Access Role** will have *access* to
- To ensure that all users have the correct access role and access setup, a list of all active users and their current access role will be distributed via email
- Each agency should review the list and update any access roles needed for CE
- Agencies should respond by **Tuesday, March 5th** with access role updates
- Each agency should also identify any new users and contact the Bitfocus HelpDesk to get user set-up and access

ZIP CODE CLARIFICATION

Clarification Questions

What does it mean by last permanent zip code?

Stable or where they came from last time?

Difference between Permanent vs. Last Place?

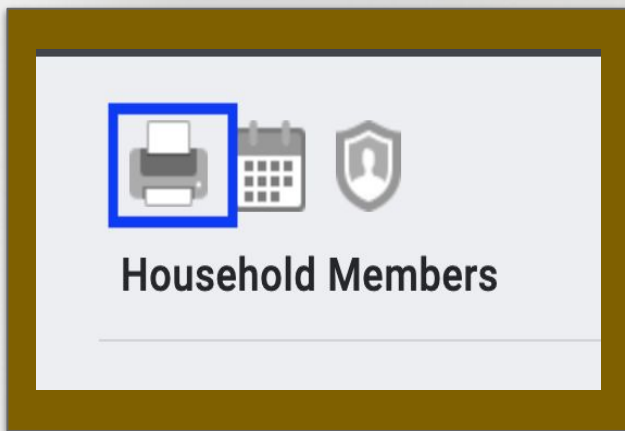
And could they track last city instead of last zip code?

HOMELESS STATUS TIMELINE REPORT - [CLNT-127]

A Client Level Report that will show the different program enrollments and services received by a client that can be used as a tool to help determine chronic homelessness (as defined by HUD)

This tool is useful in that it assists the end user in piecing together a timeline a client may not otherwise recall with certainty and specificity

HOMELESS STATUS TIMELINE REPORT - [CLNT-127]



Select the **PRINTER** icon
from the client profile

HOMELESS STATUS TIMELINE REPORT - [CLNT-127]

CLIENT REPORTS	
[CLNT-101] Case Notes	RUN SCHEDULE
[CLNT-102] Client History	RUN SCHEDULE
[CLNT-103] Photo ID Card - Sample	RUN SCHEDULE
[CLNT-104] Profile Screen	RUN SCHEDULE
[CLNT-105] Client Appointments	RUN SCHEDULE
[CLNT-106] Client Service Notes	RUN SCHEDULE
[CLNT-125] Client Summary	RUN SCHEDULE MORE INFO ▼
[CLNT-127] Homeless Status Timeline	RUN SCHEDULE
[CLNT-128] Client Enrollment Details	RUN SCHEDULE
[HUDX-233] Client-Level System Use & Length of Time Homeless Report	RUN SCHEDULE MORE INFO ▼

1. From the **CLIENT REPORTS** list select [CLNT-127] Homeless Status Timeline
2. Select Run-enter the time frame desired
3. Select the desired format (Web page/PDF)

HOMELESS STATUS TIMELINE REPORT - [CLNT-127]

Client Timeline Enrollments

CA-501 - San Francisco CoC: System

Report period 01/01/2018 - 02/21/2019

Client Name: Test Test

Unique ID: 953C30A2C

	2019				2018											
	2	1	12	11	10	9	8	7	6	5	4	3	2	1		
SUMMARY - Homeless Status (per HUD definition)	N	N	N	?	?	?	?	?	?	?	?	?	?	?		
[Compass Family Services]Compass Family Services - Rapid Rehousing Program																
[Compass Family Services]Compass Family Shelter																
[Fake Example Agency]Fake PSH Program																
[Hamilton Families]Hamilton Family Residence																
[San Francisco Family Coordinated Entry Agency]Bayview Access Point																

Color Explanation

Emergency Shelter/Safe Haven/Street Outreach	
Permanent Housing Enrollment with Move-in Date	
Permanent Housing Enrollment without Move-in Date	
Transitional Housing Enrollment	
Other HMIS Enrollment	
PH Move-in Date	MI
No required service to confirm homelessness	NS
Service placed outside of enrollment	S

This report is a tool that can assist in documenting chronic homelessness, but does not constitute chronic homeless documentation in and of itself. All information on this report should be reviewed for accuracy and extenuating circumstances.

[Homeless Status
Timeline Report Guide](#)

NEW FEATURES IN ONE

Notifications for Clarity Inbox Messages



Dear Alison Wilson,

Sarah Dougherty from Sarah Smith Housing Services has sent you a message via your Clarity Inbox. Click [here](#) to read it.

NEW FEATURES IN ONE


Program Exit Date Warning if Date Is Invalid

⚠ Warning: Project Exit Date is earlier than Project Entry Date. Please update Project Exit Date to proceed.

PROGRAM: COMPASS FAMILY SERVICES - RAPID REHOUSING PROGRAM

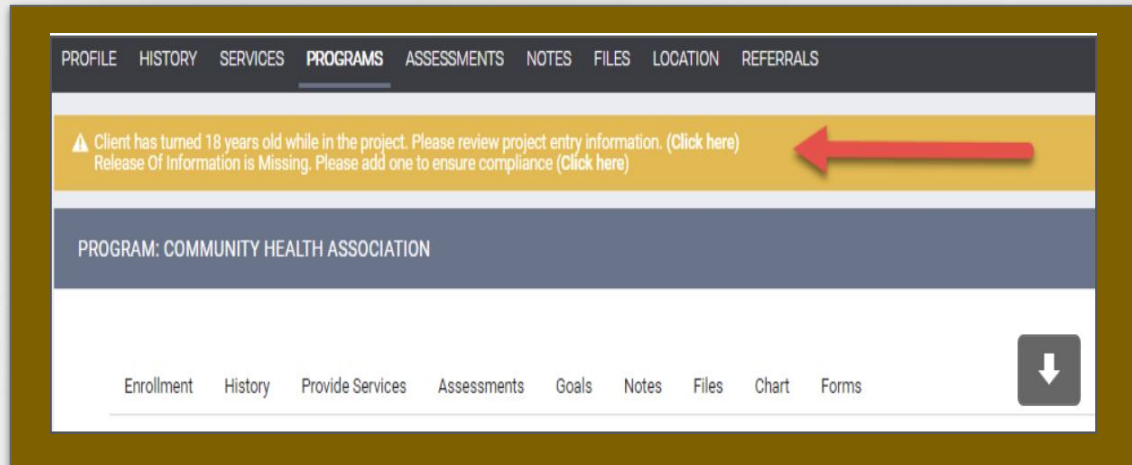
Enrollment History Assessments Notes Files Chart Forms

End Program for client Test Test

Project Exit Date 12/01/2018 

NEW FEATURES IN ONE

‘Aged Into Adulthood’ Notification at Program Exit



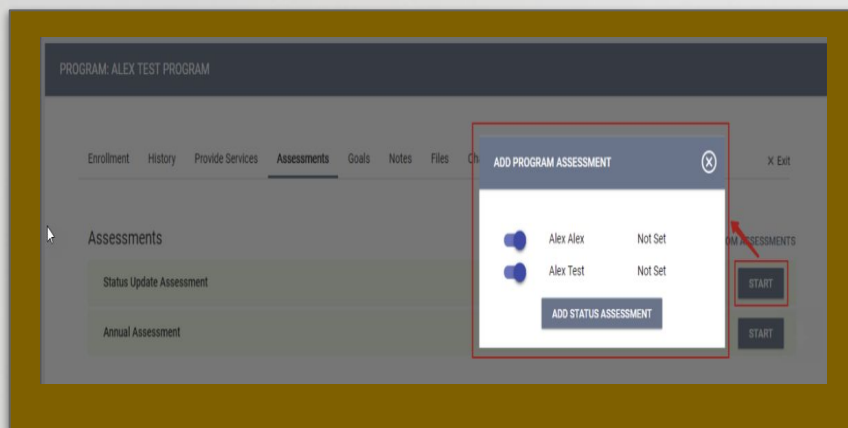
NEW FEATURES IN ONE

Add Notes to
Location Tab

A screenshot of a web form titled "CLIENT LOCATION" is shown within a yellow-bordered frame. The form contains several input fields: "Address Type" (a dropdown menu with "Home" selected), "Name" (a text field with a small icon on the right), "Address (line 1)", "Address (line 2)", "City", "State" (a dropdown menu with "CA - California" selected), "Zip Code", "Email", "Phone (#1)", "Phone (#2)", and "Status" (a toggle switch). At the bottom of the form, a new "Note" field has been added, outlined with a red border. This field includes a rich text editor toolbar with buttons for bold (B), italic (I), link (chain icon), and unlink (chain icon with slash), and a large text area for the note. A small grey button with a downward arrow is located at the bottom right of the note field.

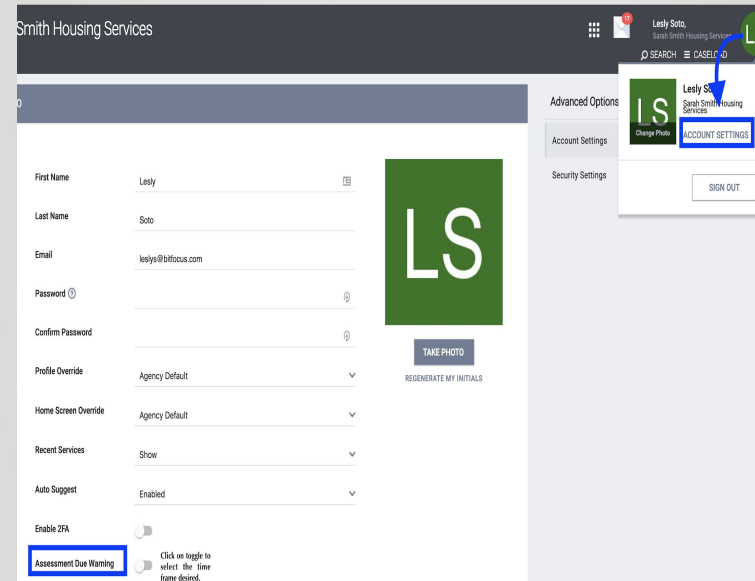
NEW FEATURES IN ONE

Select Multiple Group Members When Completing Annual/Status Assessments



NEW FEATURES IN ONE

- Ability to Set Assessment Warning for 30 Days vs. a maximum of two weeks before assessment is due
- Find this setting under the Account Settings under the user icon



NEW FEATURES IN ONE

Canned Reports Listed Alphabetically by Report Abbreviation-Number

Program Based Reports		23 report(s) 
[DQXX-102] Program Data Review	 RUN  SCHEDULE MORE INFO~	
[DQXX-121] Project Start Date > Project Exit Date	 RUN  SCHEDULE	
[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-102] Program Service Expense Review	 RUN  SCHEDULE MORE INFO~	
[EXPS-103] Program Funding Source Financial Detail	 RUN  SCHEDULE	
[GNRL-105] Program Participation Summary	 RUN  SCHEDULE MORE INFO~	
[GNRL-106] Program Roster	 RUN  SCHEDULE MORE INFO~	

ANNOUNCEMENTS

Register for the upcoming ACE Trainings

Registration information will be provided via email

Next Months Agency Lead Meeting

When: Monday, March 25th, 10:30am - 11:30am

Where: Google Space 188 The Embarcadero

SF Upcoming Events

Local Homeless Coordinating Board Monthly Meeting

When: Monday, March 4th, 11:00am - 1:00pm

Where: San Francisco City Hall Room 416

Coordinated Entry/Online Navigation and Entry (ONE) System for Adults and Families

When: Tuesday, March 5th, 9:30am - 11:00am

Where: City Hall, Room 408

Thank You!

Questions,
Comments or
Concerns?

