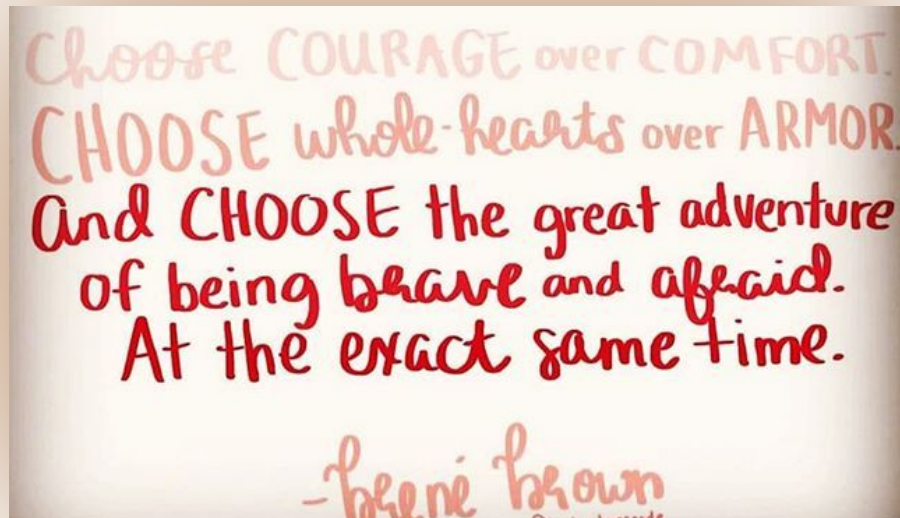




# April Agency Lead Meeting

# Welcome



**Shatae Jones, LCSW**  
**Deputy Project Administrator**  
San Francisco, California  
Pronouns: She/Her

# Agenda

- **Managing Households & Enrollments**
  - Demonstration in ONE
- **System Data Quality Spotlight Report: Client Demographic Report**
- **New Features Release April 8th, 2020**
- **Review the Department of Homelessness and Supportive Housing Announcements:**
  - **Reminder:** Release of Information
- **New Features Release: Coming Soon**
- **Friendly Competition: Pop Quiz**
- **Community Engagement Opportunities**
- **Community Resources**
  - Department of Homelessness & Supportive Housing Website
  - COVID-19 Providers Calls
  - CoC Award Nofa Kick-off Meeting Recap

# Managing Households

- Identifying “families” in ONE is done by managing households
- Having family members linked appropriately:
  - Allows users to see who the members of a household are
  - Correctly identify the Head of Household
  - Allows for data accuracy with federal reports
  - Accurate rosters for housing and other programs

# Managing Households

- Adding and removing additional family members can be managed under the client profile page.
- Simply follow the corresponding steps:
  - Go to the client profile tab
  - On the right hand panel, select the **Manage** button, this will take you to the Household Management screen
  - Search for the Household member name you would like to add then press **search**
  - Select member Type
  - Add the date of when the client should be added to the household
  - **Select Save**

The screenshot displays the Honesty Values software interface. At the top, a dark navigation bar contains the 'Honesty Values' logo, a menu with options like PROFILE, HISTORY, SERVICES, PROGRAMS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS, and a user profile for Shatas Jones. Below this, the 'CLIENT PROFILE' section is visible, showing a Social Security Number field. To the right, a 'Household Members' panel includes a 'Manage' button highlighted with a red box. The main area is titled 'HOUSEHOLD MANAGEMENT' and features a search bar with the placeholder text 'Search for a Household Member'. Below the search bar is a table with columns for 'Member Type' and 'Start Date'. A dropdown menu is open for the 'Member Type' column, listing various relationship types such as Not Set, Husband, Wife, Daughter, Son, Father, Mother, Sister, Brother, Roommate, Grandchild, Aunt, Uncle, Niece, Nephew, Grandparent, Significant Other, Domestic Partner, Spouse, Other, Stepson, Stepdaughter, Child (highlighted in blue), Parent, Sibling, and Guardian. A 'SEARCH' button is located to the right of the search bar.

Member Type	Start Date
Not Set	04/01/99
Husband	03/05/07
Wife	06/17/88
Daughter	
Son	
Father	
Mother	
Sister	
Brother	
Roommate	
Grandchild	
Aunt	
Uncle	
Niece	
Nephew	
Grandparent	
Significant Other	
Domestic Partner	
Spouse	
Other	
Stepson	
Stepdaughter	
<b>Child</b>	
Parent	
Sibling	
Guardian	

# Enrollments In ONE

- Enrollments are completed to show that clients are actively being engaged by the Homeless Response System
- In many cases, fields from the enrollment will cascade forward to other fields/ screens in ONE
- Enrollments are a HUD requirement

# Enrollments In ONE

- **Step 1:** To Begin the enrollment process Click on the **Program Tab** in the top menu of the client record. You will see two sections:
  - **Program History:** Which provides a list of the programs your client is either currently enrolled in, or has been enrolled into in the past
  - **Programs Available:** Indicates programs provided by your agency that are available for client enrollment
- **Step 2:** Select the **drop down arrow** next to the applicable program

Lavender Jonez

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	01/01/2000	01/01/2000	Individual

PROGRAMS: AVAILABLE

1036 Mission	▼
1036 Mission S+C	▼
626 Mission Bay Boulevard North	▼
626 Mission Bay Boulevard North CoC	▼
Ambassador Hotel	▼
Civic Center Residence S+C	▼
Eddy and Taylor	▼
Ellis Street Apartments	▼
Folsom Dore	▼
Franciscan Towers	▼

Managed with Clarity Human Services

Recover deleted data

# Enrollments In ONE

- **Step 3:** If you are enrolling a family, be sure to **toggle on** the group members you would like to enroll into the program
- **Step 4:** Select the **Enroll button**

Lavender Jonez

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
ECS: Bayview Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency	01/01/2000	01/01/2000	Individual


PROGRAMS: AVAILABLE

1036 Mission

1036 Mission S+C

626 Mission Bay Boulevard North

626 Mission Bay Boulevard North CoC

 Funding Source

N/A


**Availability**

Full Availability

**Include group members:**

☒ Periwinkle Jonez

Please make sure to toggle on household members

 DOC REQUIREMENTS

Ambassador Hotel


ENROLL




# Enrollments In ONE


- A similar enrollment screen will open. You may notice that some of the fields auto-populated. Please confirm the information is up-to-date
- When possible, **complete all fields.**
- **Avoid answering “Data Not Collected” whenever possible**
- **Select Save & Close**


Enroll Program for client Freddy Fox


Program Entry Date 08/27/2019 


DISABLING CONDITIONS AND BARRIERS


Disabling Condition Select 


Physical Disability Select 


Developmental Disability Select 

Chronic Health Condition Select 


HIV - AIDS Select 

Mental Health Problem Select 


Substance Abuse Problem Select 

Victim of Domestic Violence Select 


CASH INCOME FOR INDIVIDUAL

Income from Any Source Select 

NON-CASH BENEFITS

Receiving Non-Cash Benefits Select 

HEALTH INSURANCE

Covered by Health Insurance Select 

**SAVE & CLOSE** **CANCEL**

If any of the fields auto-populated from a previous enrollment, please confirm the information is still up to date.

Complete all fields when possible. Try to avoid selecting “Data not collected” when possible.

# Enrollments In ONE

- The relationship to the Head of Household should be selected at time of enrollment
- A common mistake is either leaving this blank or selecting Head of Household for children

Periwinkle Jonez

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

Your changes have been saved successfully.

Enroll Program for client Periwinkle Jonez

Project Start Date 04/03/2020 click

Relationship to Head of Household Head of household's child

Is the Program Type a Permanent Housing Program Type? Yes (Automatically Generated Response) ▾

Zipcode 94102

Quality of Zip Code Full or Partial Zip Code Reported ▾


Select

- ✓ Head of household's child
- Head of household's spouse or partner
- Head of household's other relation member
- Other: non-relation member


# Managing Households


- The relationship to the Head of Household should be selected at time of enrollment
- A common mistake is either leaving this blank or selecting Head of Household for children


Enroll Program for client Freddy Fox


Program Entry Date 08/27/2019 


DISABLING CONDITIONS AND BARRIERS


Disabling Condition  


Physical Disability  


Developmental Disability  

Chronic Health Condition  


HIV - AIDS  

Mental Health Problem  


Substance Abuse Problem  

Victim of Domestic Violence  


CASH INCOME FOR INDIVIDUAL

Income from Any Source  

NON-CASH BENEFITS

Receiving Non-Cash Benefits  

HEALTH INSURANCE

Covered by Health Insurance  

**SAVE & CLOSE** **CANCEL**

**If any of the fields auto-populated from a previous enrollment, please confirm the information is still up to date.**

**Complete all fields when possible. Try to avoid selecting "Data not collected" when possible.**

A dark blue background with a bright spotlight effect in the upper right corner, casting a beam of light across the scene and creating a glowing oval on the floor.

System Data Quality Spotlight Report:

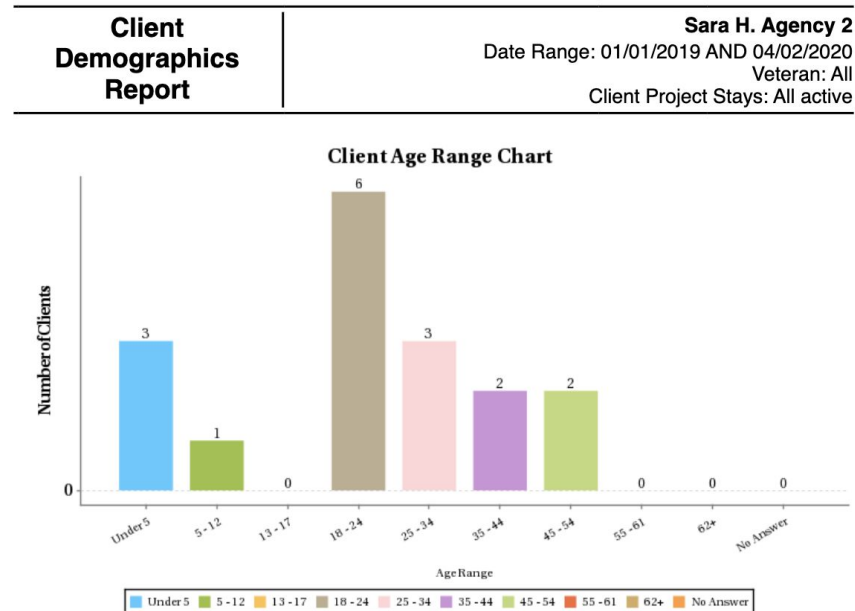
*Client Demographics  
Report*

# [106-OUTS] Client Demographics Report

- The Program Client Demographics report provides demographic information for persons enrolled in specified program(s) during specified periods of time.
- **Captures the following data element:**
  - Client Age Range
  - Gender
  - Race
  - Disabled Demographic (Adults & HoH)
  - Physical Disability
  - Developmental Disability
  - Chronic Health Condition
  - HIV/AIDS
  - Mental Health Problem
  - Substance Abuse
  - Chronic Homelessness
  - Veteran Status
  - Hispanic Ethnicity
  - Prior Living Situation
  - Prior Living Duration
  - Individual Income
  - Household Income
  - SSN Validity

# [106-OUTS] Client Demographics Report

- This report is essentially helpful if you are required to export data to funder or for presentations as it is another visually appealing way to capture the data on your clients (especially as you take into account various learning styles of your audience or staff)
- The Client Demographics report employs the use of bar/column charts and pie charts to visualize the included data. For each type, a table is included to display details on the data.



# [106-OUTS] Client Demographics Report

- This report also includes the Drill down functionality which will allow providers to access determine specific client information associated with each of the data elements
- **For Example:** If the provider was interested in drilling down on the Total persons for age range of 25-34, the provider can click #of clients and gain access to a list of client names that fell within this category.

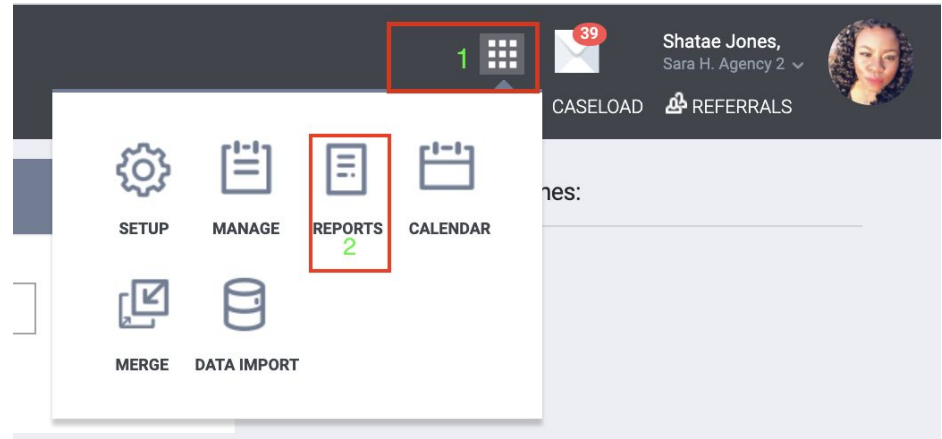
Age Range	# of Clients
Under 5	3
5 - 12	1
13 - 17	0
18 - 24	6
25 - 34	3
35 - 44	2
45 - 54	2
55 - 61	0
62+	0
No Answer	0
Total:	17

*\*Also a great PDF exportable document*

# To Access [106-OUTS] Client Demographics Report

## How to Access The Program Details Report:

1. Log into the Clarity System & Access the Launcher Icon
2. Select Reports





# To Access [106-OUTS] Client Demographics Report

## How to Access The Program Details Report:

3. Select Program Based Reports and expand page by selecting the drop down arrow
4. Select Client Demographic Report

Program Based Reports	23 report(s)	
<u>[OUTS-106] Client Demographics</u>	▶ RUN   📅 SCHEDULE	MORE INFO
[OUTS-205] Program Recidivism	▶ RUN   📅 SCHEDULE	
[OUTS-720] Client Program Service	▶ RUN   📅 SCHEDULE	

# New Features Release

*Live April 8, 2020*



# New Features Release

**April 8th:** Bitfocus released several new features for The ONE System. Those features include:

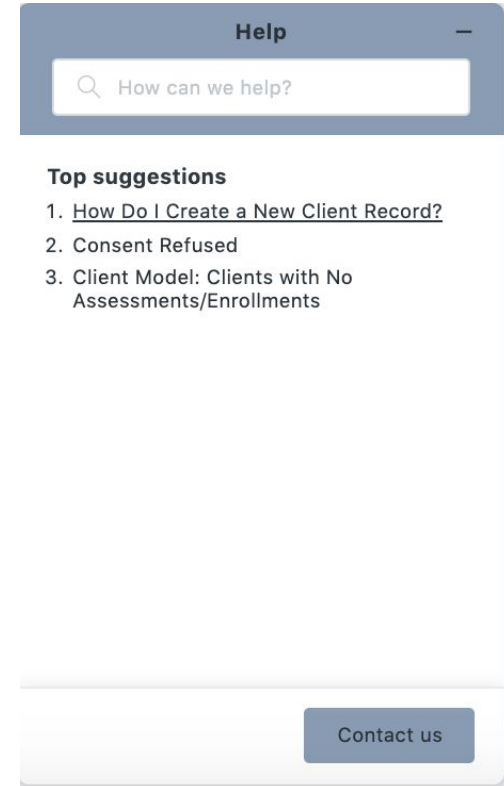
- Help Center Widget
- Crisp Clean look & functionality for Maintaining History of Referral Creation and Outcome for Expired Referrals
- Staff Member Phone Number Field added to staff profile page
- Client History Coordinated Entry Filter

# New Features Release: Help Center Widget

- The new Help Center Widget allows you to conveniently search the Help Center without leaving the ONE System. Clicking on the widget shows Help Center articles related to whatever screen you're on in ONE, and if you don't find what you need, you can immediately connect with the Helpdesk for more help.

## How do you access this new feature:

- Simply Log-on to the ONE System
- From any screen, access the Help Widget, located in your bottom right hand corner.
- By clicking the help icon, the page will expand allowing you to search for more information



# New Features Release: History of Referral Creation and Outcome for Expired Referrals

- Referral creation and expiration is now tracked in greater detail in a referral's *History* section. When a pending referral expires and is reassigned to the *Community Queue*, an activity titled "Expired: Reassigned to Community Queue" will be added to the referral history. When a referral is first recorded from the client record *Referrals* tab, this will also now be recorded in the *Referral History* as "Program Referral: <program name>, <agency name>"

HISTORY			
Activity	Date	Days Pending	Staff
Referral expired	01/10/2020 2020-01-10 03:40:36	143	Admin Admin [TRAINING] System
Denied: Reassigned to Community Queue: Housing Community Queue	08/20/2019 2019-08-20 12:16:40	0	Sarah Dougherty Sarah Smith Housing Services
Program Referral: Test PSH Program, Sarah Smith Housing Services	08/20/2019 2019-08-20 12:15:46	0	Sarah Dougherty Sarah Smith Housing Services
Expired: Reassigned to Community Queue	08/20/2019 2019-08-20 03:40:35	1	Admin Admin [TRAINING] System
Program Referral: Test PSH Program, Sarah Smith Housing Services	08/19/2019 2019-08-19 09:43:06	27	Sarah Dougherty Sarah Smith Housing Services
Expired: Reassigned to Community Queue	07/23/2019 2019-07-23 03:40:36	1	Admin Admin [TRAINING] System

# New Features Release: Staff Member Phone Number Field

- The staff profile page is also where providers and system users can create spaces of continuity by keeping track of updated information as it pertains to a particular staff member(s) in the system
- This is also where end users will go to modify their account information
- To support continued continuity through information sharing, Bitfocus has now added a phone number section to your user account page, to make it easier for other users to reach you.

# New Features Release: Staff Member Phone Number Field

- Bitfocus has now added staff phone number and extension section that can now be added to a staff members record

**\* \*Note: the extension section does not comprehend punctuation (ie. x234/.234)**

## To Access Staff Profile:

1. Log-into the System
2. Select the Launcher icon
3. Choose the Manage Icon
4. Select Staff

Jonez Housing Development Corporation

OVERVIEW SERVICES FUNDING PROGRAMS ACCOUNTS ASSESSMENTS SITES STAFF SHARING DATA ANALYSIS

MODIFY THE STAFF

Username: Testing.Jonez

First Name: Testing

Last Name: Jonez

Email Address: shatao.therapist.jones@gmail.com

Phone Number: 510-411-0143 Ext. XXXXX

Access Role: [SF] Access Point Staff

Agency: Jonez Housing Development Corporation

Status: Active

Profile Override: Agency Default

Enable 2FA: ☐

Force Password Change: ☐ User will be required to change password on next login

Date of last password change: (Not set)

Password:

Confirm Password:

Auto Suggest: Enabled

Assessment Due Warning: ☐

Last User Policy updated: Never

Last Visited: 04/12/2020 18:50 PM

SAVE CHANGES CANCEL

# New Features Release: Client History Coordinated Entry Filter

- A new *Coordinated Entry* filter was added to *Advanced Search Options* in the client *History* tab. By toggling on this filter, only Coordinated Entry-related items will display in the client history. Learn more in our updated [article on the History Tab](#).

## HISTORY

### Advanced Search Options Hide ^

Search	<input type="text"/>	Category	Any category <span>▼</span>	Agency	Any agency <span>▼</span>
Start Date	<input type="text"/> 	End Date	<input type="text"/> 	Type	Any type <span>▼</span>
Coordinated Entry <input type="checkbox"/>				Clear	SEARCH



# Department of Homelessness & Supportive Housing Announcements



DEPARTMENT OF  
HOMELESSNESS AND  
SUPPORTIVE HOUSING

# HSH Announcements: REMINDER

- Release of Information changes Go Live happened **04/01/2020**
- Please note that the **start date is the day the ROI was completed**, not when it was uploaded
- **Please do not change the end dates of the ROI**

## RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	03/12/2020	
End Date	03/12/2023	
Documentation	Select	▼

# HSH Announcements: REMINDER

- **Compliance Warning Ribbon Reminder:**
- Due to these system wide changes, users will see compliance warnings for clients who do not have a Homeless Response System (HRS) Release of Information recorded in the system.
- The ROI setting change effective 4/1/20 will account for why users may see compliance warnings for clients whose records we migrated into ONE without the Homeless Response System ROI and clients with profiles in ONE prior to the July 1, 2019 roll out of the [Department of Homelessness and Supportive Housing Privacy Practice and Releases of Information](#).
- You do not need to do anything at this time for those clients. Bitfocus is working with HSH on developing a clean-up plan for these specific clients.

The screenshot displays the 'Daffy Duck' client profile interface. At the top, a navigation bar includes the user's name 'Zoëy Keeper, Help Center Agency' and a search bar. Below this, a yellow banner contains a warning: 'Release Of Information is Missing. Please add one to ensure compliance' with a 'Click here' link. The main section is titled 'CLIENT PROFILE' and contains a table of client information:

Social Security Number	XXX - XX - 0459
Quality of SSN	Full SSN Reported
Last Name	Duck
First Name	Daffy
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	10/19/1999

To the right of the table is a placeholder for a profile picture and a 'UNIQUE IDENTIFIER' box containing the text 'FAD1B36C1'. Below the table, it says 'Adult. Age: 18'. On the right side of the interface, there is a 'Household Members' section with a 'Manage' button and a note that there are 'No active members'. A red box highlights the 'Household Members' icon in the top right navigation area. A large download arrow button is located at the bottom right of the interface.

# Sneak Peak

# New Features Coming Soon

*Starting May 1, 2020*



# Coming Soon in ONE- Auto Exits for Coordinated Entry Program

**Scheduled to GO Live May 1, 2020**

- Coordinated Entry programs will now be configured to automatically exit clients when they are housed through another program. This feature will trigger when a client has a housing move-in date into any permanent housing program type or when a client exits from any program enrollment into a housed destination.
- A pop-up will display for users when they attempt to save a record that will trigger an auto exit due to the client being housed.

onesf-train.clarityhs.com says

You entered data indicating that this client is housed. As a result, this client will be exited from Coordinated Entry. Please confirm.



# Coming Soon in ONE- Release of Information Status on the Client Search page

**Scheduled to GO Live May 1, 2020**

- Users will now be able to see a client's release of information status on the client search page. Clients with active Homeless Response System ROI, as documented by the ROI Privacy Shield e-signature, will show a yes and clients with an expired or missing ROI e-signature will show missing.


SEARCH FOR A CLIENT

ADD CLIENT +

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

	Date of Birth	Last Four SSN	Last Updated	ROI
Chocolate Shake	01/01/2000	3547	04/11/2020	Missing
Chocolate Cake	01/01/1999	5042	04/11/2020	Yes

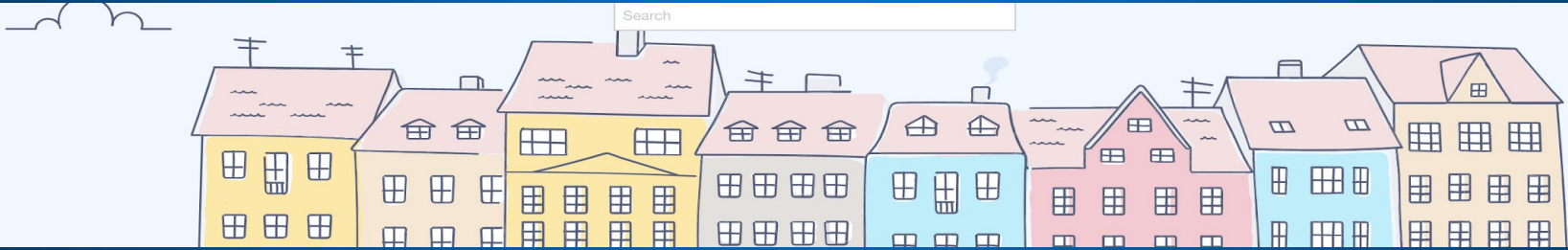


# Community Connections Pop Quiz

**Directions:** On the Next Page our System Admin will ask a question regarding the ONE System. Be the first person to enter a response in the chat box.

**Rules:**

1. Please allow for the System Admin to completely read the question before you enter an answer in the chat box
2. Your response cannot be from the Data Quality Spotlight section

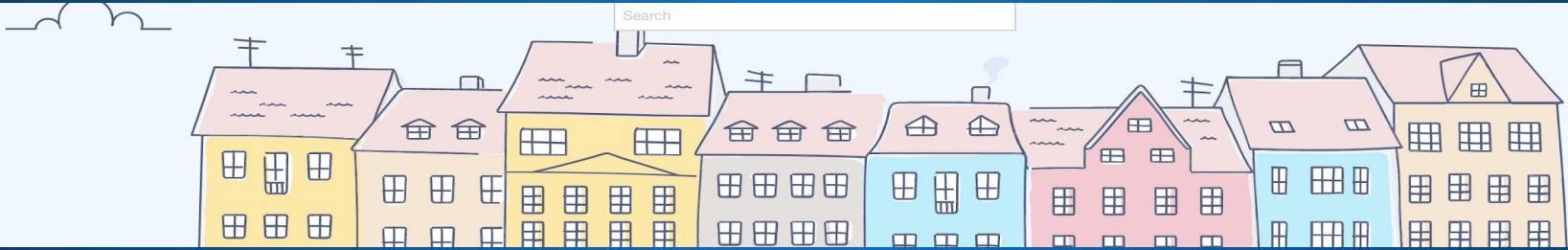


## Agency Lead Meeting: Community Pop Quiz

- 1. Name a ONE System Report that you use to support your agency with Continuous Data Quality Improvement?*



# Agency Lead Meeting Virtual Feedback Channel



# Agency Lead Meeting Virtual Feedback Channel

As providers you are charged with ONE of the most important jobs in the world, caring for our community. As a provider myself, I recognize that happens in a plethora of ways. One of those most important ways is capturing our clients stories through documentation and data entry.

As your Bitfocus partners, it is our responsibility to bring forth helpful information regarding ONE System functionality, that can support you in your daily interactions with clients



<https://onesfagencylead.typeform.com/to/Y2KJKz>

📄 **onesfagencylead.typeform.com**

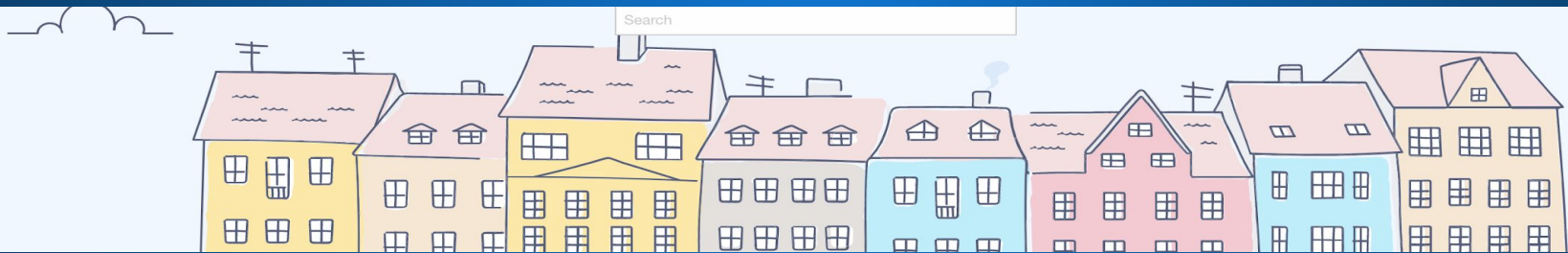
**Bitfocus ONE SF Community Virtual Feedback Channel**

Turn data collection into an experience with Typeform. Create beautiful online forms, surveys, quizzes, and so much more. Try it for FREE. (193 kB) ▾

**Agency Lead Meeting Virtual Feedback**



# Community Resources



# Community Resources:

- Calling All Providers, Bitfocus would like to draw your attention to the HSH website <http://hsh.sfgov.org/updates/> where you can find helpful up-to-date resources such as.
  - Supply request form information
  - Homeward bound referral forms
  - Pit Stop & Handwashing Stations
  - A Dedicated COVID-19 Section

- **COVID-19 Provider Calls are happening Weekly:**

**Join our friendly partners at HSH on Tuesdays & Thursdays from 4:00pm-5:00pm**

**via Microsoft Teams: [Join Microsoft Teams Meeting](#)**

+1 415-906-4659 United States, San Francisco (Toll)

Conference ID: 183 824 54 8#

# Community Resources:

- **COC NOFA Recap:**

- [https://homebaseccc.zoom.us/rec/play/75Uvcu6s\\_Tg3HNeXuQSDVKN7W9TsLqKs1SINq\\_NbmRvnAHkKNVOuZ-dAMoZ87ZnTyN8lkvqNAJR\\_t2Kh?autoplay=true&continueMode=true&startTime=1585933153000](https://homebaseccc.zoom.us/rec/play/75Uvcu6s_Tg3HNeXuQSDVKN7W9TsLqKs1SINq_NbmRvnAHkKNVOuZ-dAMoZ87ZnTyN8lkvqNAJR_t2Kh?autoplay=true&continueMode=true&startTime=1585933153000)

## **HSH IS HIRING**

<https://www.jobapscloud.com/SF/sup/bulpreview.asp?R1=PEX&R2=1054&R3=105370>

**jobapscloud.com**

**1054 ONE System Principal Business Analyst**

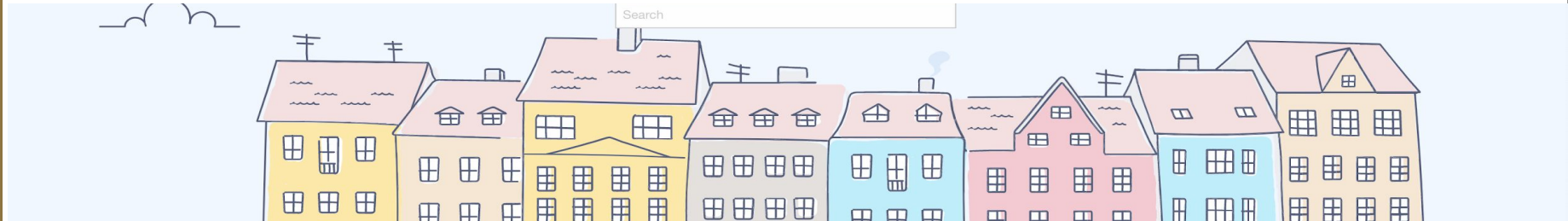
We are hiring for 1054 ONE System Principal Business Analyst.

# ONESF Help Center Website

<https://onesf.clarityhs.help>

## Bitfocus Helpdesk

[onesf@bitfocus.com](mailto:onesf@bitfocus.com)



# Thank You From Your San Francisco Team!



**Ja Eun Guerrero  
Huh, LCSW**  
Senior Project  
Administrator



**Shatae Jones,  
LCSW**  
Deputy Project  
Administrator



**Sara Hoffman**  
Project Manager