April Agency Lead Meeting

Bitfocus

Welcome

Choose COURAGE over COMFORT.
CHOOSE whole-hearts over ARMOR.
And CHOOSE the great adventure
of being brave and afraid.
At the exact same time.

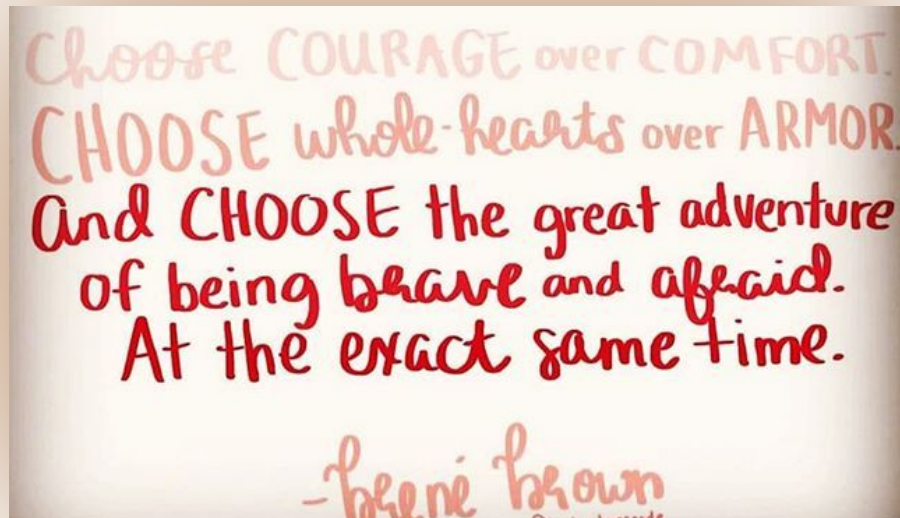- brené brown

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**

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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

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**

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, c**omplete 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 possile.

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

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Physical Disability	Select
Developmental Disability	Select
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HIV - AIDS	Select
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Complete all fields when possible. Try to avoid selecting "Data not collected" when possile.

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

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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.

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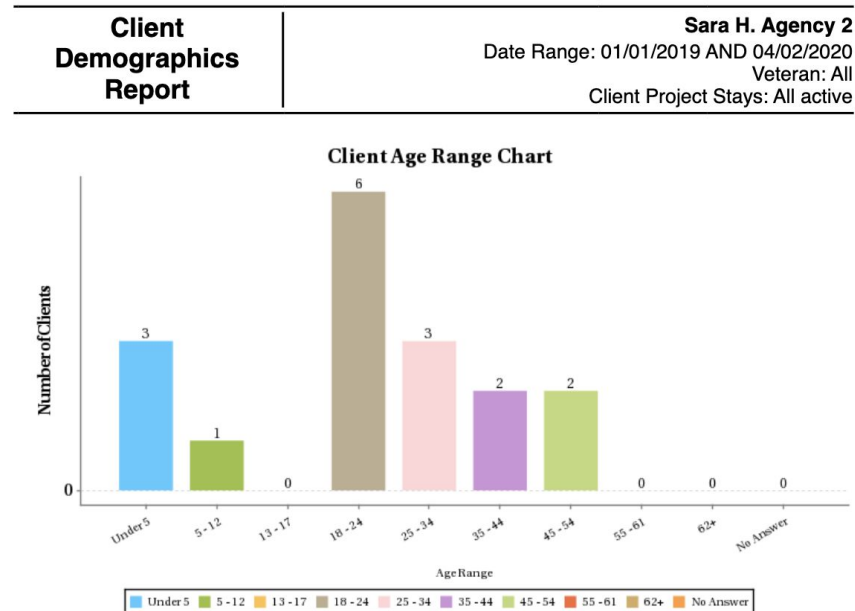
[106-OUTS] Client Demographics Report

- 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

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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
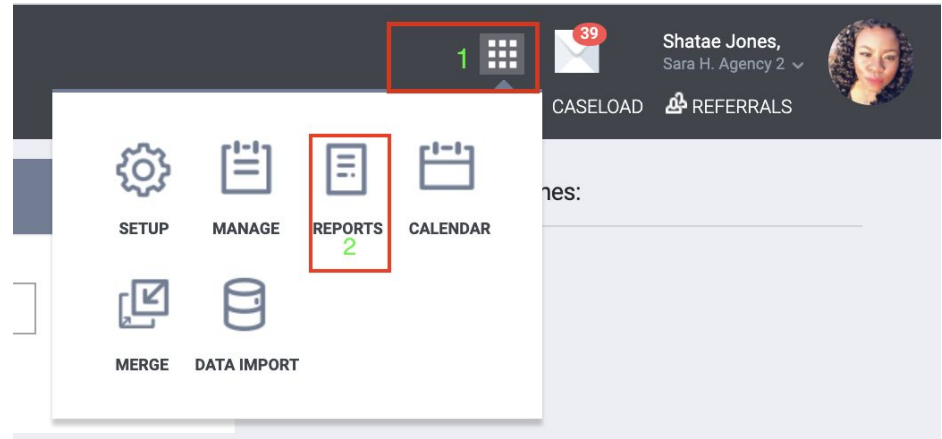
To Access [106-OUTS] Client Demographics Report

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

New Features Release

Live April 8, 2020

Bitfocus

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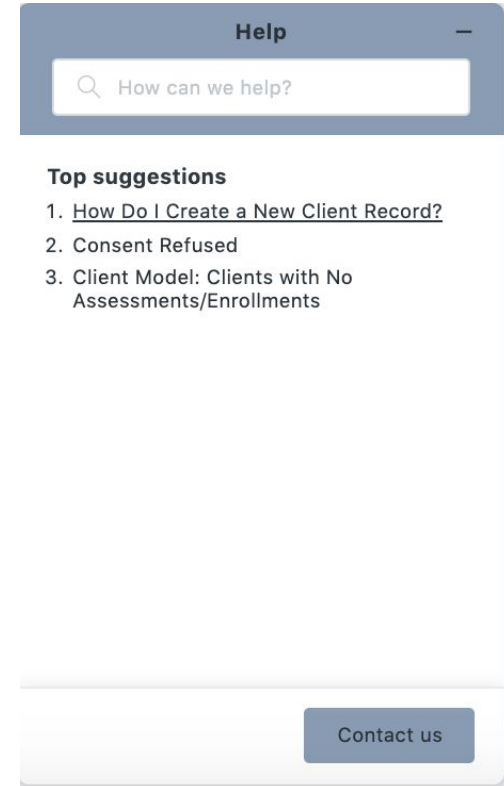
New Features Release: History of Referral Creation and Outcome for Expired Referrals

- 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

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 | | Category | Any category ∨ | Agency | Any agency ∨ |

Start Date ___/___/_____   End Date ___/___/_____   Type   Any type ∨

Coordinated Entry ⬤◯

Clear   **SEARCH**

Department of Homelessness & Supportive Housing Announcements

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

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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.

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Sneak Peak
New Features Coming Soon

Starting May 1, 2020

Bitfocus

Coming Soon in ONE- Auto Exits for Coordinated Entry Program

<u>Scheduled to GO Live May 1, 2020</u>

- 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.

Cancel   OK

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.

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

Search

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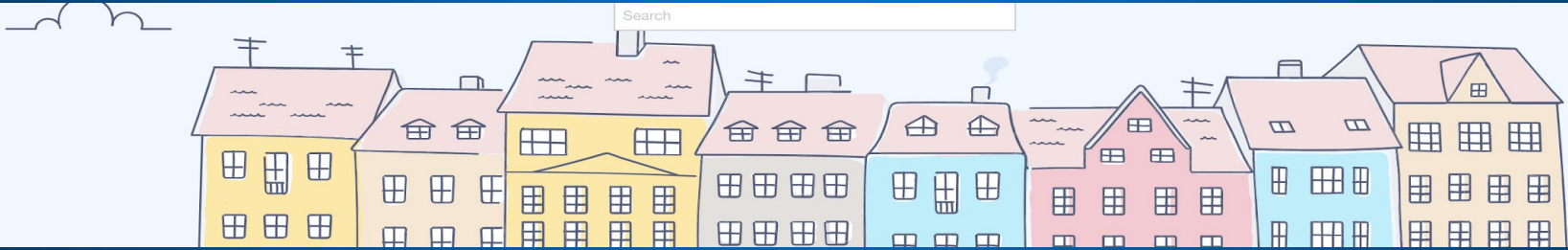
1. *Name a ONE System Report that you use to support your agency with Continuous Data Quality Improvement?*

Agency Lead Meeting Virtual Feedback Channel

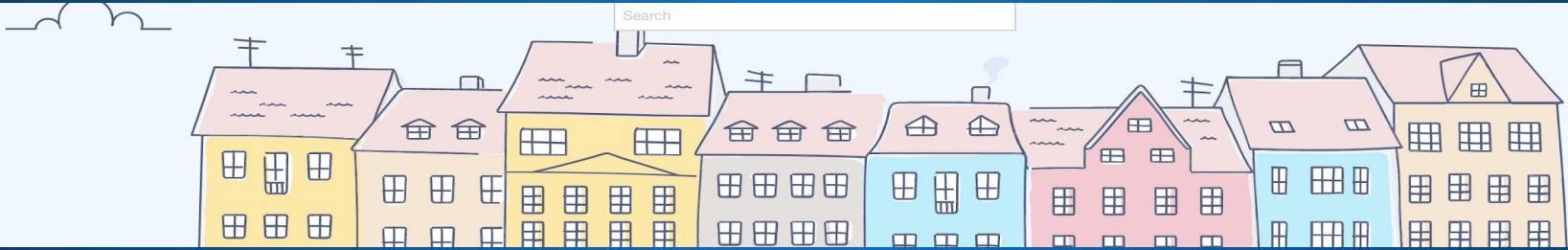# Agency Lead Meeting Virtual Feedback Channel

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
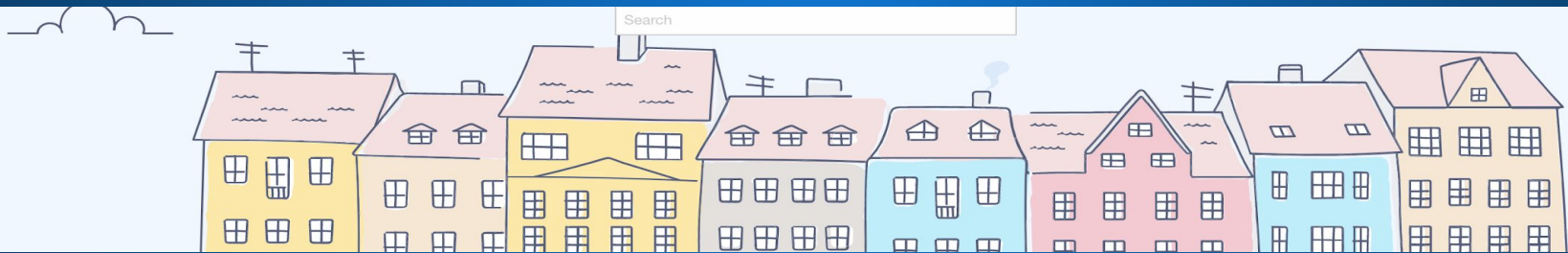
T onesfagencylead.typeform.com

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_Tg3HNeXuQSDVKN7W9TsLqKs1SlNq_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
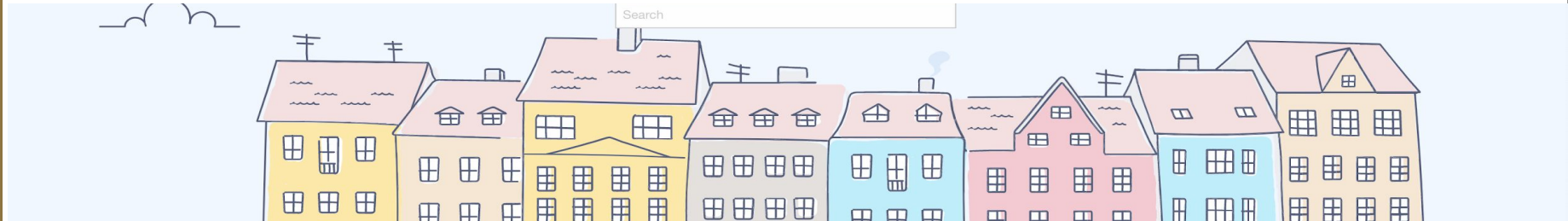
Thank You From Your San Francisco Team!

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Sara Hoffman
Project Manager

Bitfocus