May Agency Lead Meeting

Bitfocus

By Learning You Will Teach;
By Teaching You Will Learn.
Latin Proverb

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Pronouns: She/Her

Agenda

- **Program Exits**
  - Demonstration in ONE
  - Highlight Common Data Quality Errors related to Program Exits & Offer helpful tips
- **System Data Quality Spotlight Report:**
  - **Duplicate Client Report**
    - Demonstration of how to run the reports & unpacking data quality
  - **Program Rosters**
    - Demonstration of how to run the reports & unpacking data quality
- **Review the Department of Homelessness and Supportive Housing Announcements:**
  - Reminders New Features Live May 1, 2020: Coordinated Entry & Release of Information Status
- **Community Engagement Opportunities**
- **Community Resources**
  - Solid Start Resource
  - Homeward Bound Resource
  - COVID-19 Providers Calls

Exiting Households

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Exiting Households

- Exiting household members is an essential component to managing data quality
- Having individuals or family members exited appropriately:
    - Allows users to see who the members of a household are
    - Correctly identify available resources
    - Allows for data accuracy with federal reports
    - Accurate rosters for housing and other programs

Exiting Households

To Exit a client from a program:

1. Click the **Programs Tab**
2. Select the Edit Icon next to the program name

3. Next, select the

exit icon

Exiting Households

If Exiting a Household

- **Toggle On** the clients who are also exiting from the household

- Select **end program**

- You will be prompted to the exit screen

- Please make sure to update the exit destination

- The red banner indicates that the client is now exited from the program
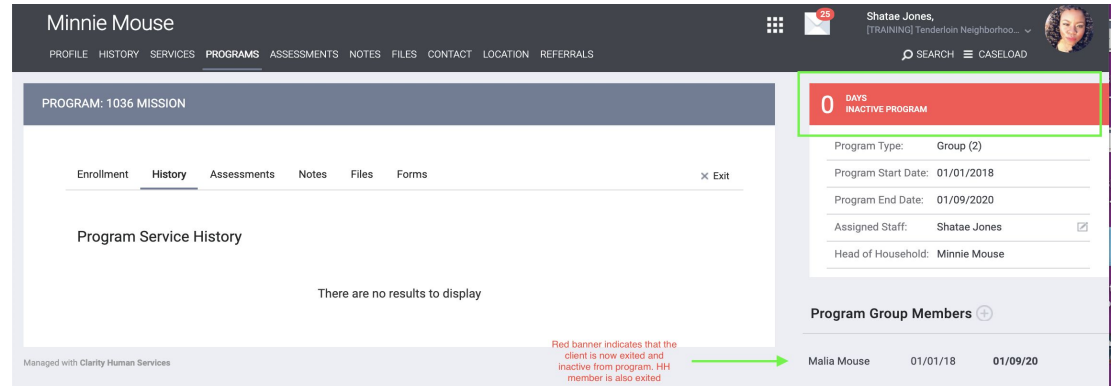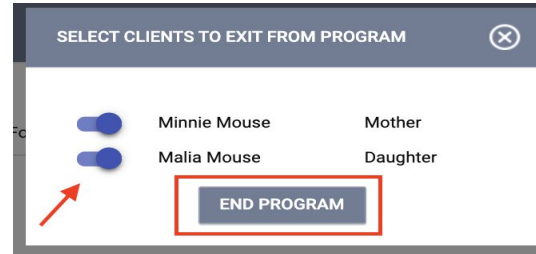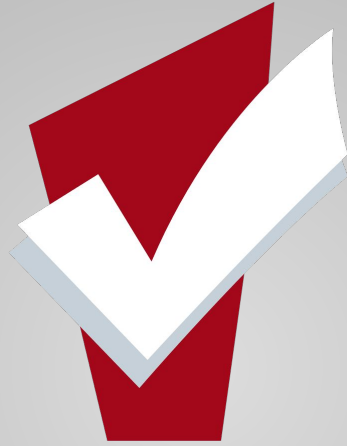
Community Pop Quiz

Community Pop Quiz

- What is the number one Data Quality issue when exiting households with multiple members?

    A. Forgetting to insert an exit date

    B. Forgetting to toggle on Household membe

    C. Forgetting to Save

Live Poll: https://app.sli.do/event/7ftvw8fm/live/polls

Let's Talk about Common Data Quality Errors & Helpful Solutions

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Common Data Errors

- Forgetting to toggle on household members at exit is one of the most common data quality errors when exiting clients
- Unfortunately one slip of the wrist can impact Agency Program Rosters and Federal Reporting (Such as HUD Annual Performance Reports)
- Most importantly by forgetting to toggle on household members, household composition in ONE can also be impacted

Common Data Errors

TIPS

- Once you have exited your household, pay attention to the right hand panel that displays the red banner. You will notice here, that the client and household members have the same end date. This is a telling sign that household has been exited. (The end date of the household member will also be bolded)
- Also, when the toggle is selected for both HH & Members, the screen will automatically cascade to open each family member

0 DAYS INACTIVE PROGRAM	
Program Type:	Group (2)
Program Start Date:	04/04/2020
Program End Date:	05/07/2020
Assigned Staff:	Shatae Jones
Head of Household:	Minnie Mouse

Program Group Members ⊕

| Malia Mouse | 04/04/20 | **05/07/20** |

Common Data Errors--Accidental Exits

- In some cases, a client or household may be unintentionally exited from a Program and the user may need to remove the exit event to reactivate the Program Enrollment.

- Please note that this process is not intended for clients returning to the program to re-enroll. In those cases a new Program enrollment is needed

Common Data Errors--Accidental Exits

- To reactivate your an accidental exit follow the step below:

TIPS **Steps:**

1. Select the Programs Tab
2. Open the program by mousing over the program name and selecting edit
3. Select the Exit Icon
4. Delete the Project Exit Date & Save

- You will see that the enrollment is now re-activated.
- If you are working with a household, you will need to follow steps 1-4 for each household member

System Data Quality Spotlight Report:

Program Roster & Duplicate Client Report

[GNRL-106] Program Roster

- Program Rosters are such a great tool for continuous data quality improvement because of the following:
  - Lists all clients enrolled in your program
  - Displays the Unique Identifiers of specific clients for easy data retrieval
  - Program Rosters can be ran for currently active clients or clients active within a specified timeframe
  - Program Rosters can also reflect clients who were exited from your program

[GNRL-106] Program Roster: How to Access

1. Log into the ONE System and select the launcher icon
2. Select **Report Library**
3. Under the **Program Based Reports-** Locate **[GNRL-106] Program Roster Report**
4. Under **Program(s)** select one or more programs you would like included in the report.
5. Choose reporting parameters
6. Under **Report Output Format** select **Web Page**, **PDF** or **Excel**
   a. Web Page will allow you to click on the client name or ID and automatically open up the client profile in Clarity Human Services.
7. Click the **OK** button.

[GNRL-106] Program Roster:

Program Roster Report

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: Homeless Prevention											
Test, Jane	AE079F3AD	01/01/1992	26	26	10/05/2018	-	54		0	3	A. Wilson
Test, Luke	8203BAF87	01/01/2016	2	2	10/05/2018	-	54		0	0	A. Wilson
Test, Swati	A7987B4F4	12/12/1980	37	37	10/10/2018	-	49		0	2	S. Pande
Springs, Sally	4A24F5435	07/05/1985	33	33	10/15/2018	-	44		0	0	A. Wilson
Adrian Gonzalez Perez, Adrian	0CE3F2DBF	08/08/1988	30	30	09/01/2018	-	88		0	2	S. Pande
Smith, Allen	33B2B0AE9	12/12/1996	21	21	11/05/2018	-	23		0	0	A. Warmoth
Smith, Kim	6E7B16AB9	02/09/2006	12	12	11/05/2018	-	23		0	0	A. Warmoth
Pancake, Banana	8A5EA06C8	04/05/1998	20	20	11/15/2018	-	13		0	0	V. Caplan
Program: Rapid Rehousing											
Springs, Sally	4A24F5435	07/05/1985	33	33	11/14/2018	-	14	undefined	0	2	A. Wilson
Pancake, Banana	8A5EA06C8	04/05/1998	20	20	11/15/2018	-	13	undefined	0	0	V. Caplan
Test, Jane	AE079F3AD	01/01/1992	26	26	09/01/2018	-	88	undefined	1	6	A. Wilson
Smith, Tommy	C28C9F213	11/16/1996	22	22	11/16/2018	-	12	undefined	0	0	A. Wilson

Total: 12

Program Name	Project Type	Project Applicability
Homeless Prevention	Homeless Prevention	Homeless Prevention
Rapid Rehousing	PH - Rapid Re-Housing	Rapid ReHousing

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[GNRL-106] Program Roster:

Program Roster Report | **[TRAINING] Mercy Housing**
Active within [01/01/2019 - 05/07/2020]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: 1100 Ocean Avenue											
Mouse, Malia	33347CB86	01/02/2018	2	2	03/09/2020	03/09/2020	0	03/09/2020	1	0	S. Jones
Mouse, Minnie	471CA3370	01/25/1985	33	35	03/09/2018	03/09/2020	731	03/08/2020	1	0	S. Jones
Mouse, Malia	33347CB86	01/02/2018	2	2	03/09/2020	-	60	03/09/2020	0	0	S. Jones
Mouse, Minnie	471CA3370	01/25/1985	35	35	03/09/2020	-	60	03/09/2020	0	0	S. Jones

Number of Clients: 4
Number of Households: 2

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: 455 Fell Street											
Mouse, Malia	33347CB86	01/02/2018	2	2	04/04/2020	05/07/2020	33	undefined	0	0	S. Jones
Mouse, Minnie	471CA3370	01/25/1985	35	35	04/04/2020	05/07/2020	33	undefined	0	0	S. Jones
Jonez, Eddy	647800764	01/14/1986	34	34	04/01/2020	05/07/2020	36	04/01/2020	0	0	S. Jones
Jonez, Taylor	3B5D5BF8D	10/19/2011	8	8	04/01/2020	-	37	04/01/2020	0	0	S. Jones
Jonez, Sparkle	31F51B319	01/14/1985	35	35	05/07/2020	-	1	05/07/2020	0	0	S. Jones

Number of Clients: 5
Number of Households: 3

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: The Arlington HUD Chron A											
Test 11, Jason	740F19267	04/15/1980	37	40	01/17/2018	-	842	undefined	0	0	J. Fletcher

Number of Clients: 1
Number of Households: 1

Total Number of Clients: 10
Total Number of Households: 6

TIPS

Did you know that Program Rosters can also demonstrate potential data quality errors related to household composition and exits?

Duplicate Clients Report

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[DQXX-110] Duplicate Client Report

- The Duplicate Clients Report will provide you with a list of clients who are enrolled in one or more of your projects, that may have a duplicate profile in ONE

- **<u>To Access this report:</u>**
- 1. Select launcher
- 2. Choose reports
- 3. Select dropdown menu
- 4. Select Run to the right of Duplicate Clients
- 5. Choose the format in which you would like to run the report and select submit

[DQXX-110] Duplicate Client Report

Duplicated Client List | **[TRAINING] Mercy Housing**

| 🔒	Unique ID	Name	SSN	DOB	Added Date	Staff	Agency Name
	31F51B319	**Jonez, Sparkle**	**xxx-xx-8456**	**01/14/1985**	**05/06/2020**	Jones, Shatae	[TRAINING] San Francisco Youth Coordinated Entry Agency
	C1669372A	Jonez, Sparklez	xxx-xx-8456	01/14/1985	05/07/2020	Jones, Shatae	[TRAINING] Mercy Housing

Total records: 2

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How to fix duplicate client records

Fix duplicate clients:

- If you find duplicate clients and need to have them merged please reach out to the Helpdesk (onesf@bitfocus.com) to request the merge. Be sure to let us know the following:
  - The unique IDs of the two (or more) clients who need to be merged (**never** send identifying information via email!)
  - Which client is the "primary" client. Although all enrollment, service, coordinated entry and other information about duplicate clients will be merged together, we can only keep one client profile. The primary client is the one whose profile we want to keep (usually this means it has more complete information than the other profile).

Update Profile Photo

UNIQUE IDENTIFIER
C1669372A

UNIQUE IDENTIFIER
31F51B319
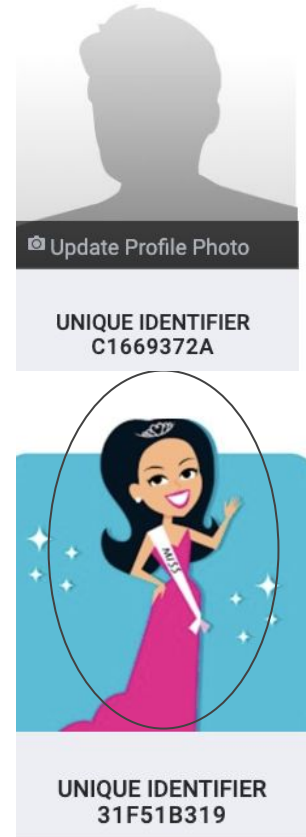
Department of Homelessness & Supportive Housing Announcements

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Reminder- Auto Exits for Coordinated Entry Program

- 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

Reminder- Release of Information Status on the Client Search page

Went 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.
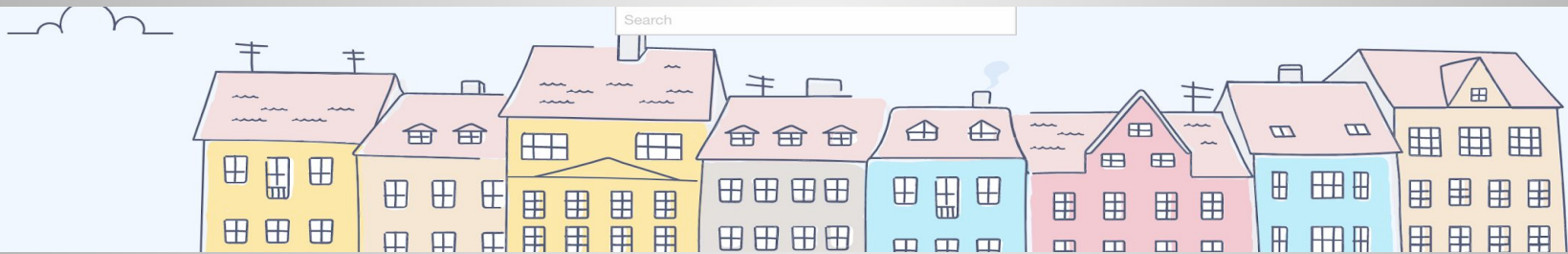
Community Resources

Question & Answer Key

- What is the number one Data Quality issue when exiting households with multiple members?

  A. Forgetting to insert an exit date

  ANSWER: B. Forgetting to toggle on Household members

  C. Forgetting to Save

ZSFG Solid Start Initiative Resource

Below please find a link to the ZSFG Solid Start Initiative resource website which includes information and updates on available community resources in response to COVID-19, such as food, housing, financial support, childcare and domestic violence resources.

https://solidstartsf.org/covid-19-resources/

solid start
Every door is an open door.

HOME   ABOUT US   **COVID-19 RESOURCES**   BLOG

Community Resources in Response to COVID-19

HELP ENSURE UNHOUSED NEIGHBORS GET THEIR STIMULUS CHECKS

Website: https://community.solutions/help-ensure-unhoused-neighbors-get-their-stimulus-checks/

April 10, 2020, update: The **Internal Revenue Service announced a new feature** that allows people who don't normally file taxes to provide their information so they can receive their stimulus check.

The new tool is designed for people who do not normally file taxes, including people with low to no income. People using this process will need to provide:

- Social Security number
- Name
- Address
- Dependents (if applicable)
- Bank or financial account information (if not provided, your check will be mailed)

COMMUNITY SOLUTIONS

The IRS is also currently developing a process for tax filers to provide bank information so their stimulus check can be deposited directly into their bank accounts. That feature is expected to be ready next week. If bank information is not provided, stimulus checks will be printed and mailed, which will extend the process for people to receive their stimulus payments. IRS NON-FILERS FORM

How are agency Lead Meetings Going?

- Remembering to share your ideas regarding helpful topics you would like to see covered
- Link address: https://onesfagencylead.typeform.com/to/Y2KJKz

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:

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

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: HSH IS HIRING

ONESF Help Center Website
https://onesf.clarityhs.help

Bitfocus Helpdesk
onesf@bitfocus.com

Thank You From Your San Francisco Team!

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