San Francisco ONE System Agency Lead Meeting

December 7, 2020



TODAY'S AGENDA

- Welcome
- Federal Reports: LSA is Underway!
- Duplicate Enrollments and Clients
- Report Spotlight Review:
 [DQXX-110] Duplicate Clients
- User Accounts
- Announcements



Welcome

What's your favorite holiday tradition? If you don't celebrate the holidays what's a tradition you make a point to uphold?

Please share name, pronouns, and agency when responding.



3

Federal Reports: The LSA is Underway!



Federal Reports: LSA is Underway!

Please respond promptly to outreach emails from the Community Administration Team

- Ensure all enrollments and exits have been entered
- Review bed/unit utilization to ensure that it is between 65%-105%
- Review data quality for each project type, paying special attention to:
 - o HoH designation and family/group enrollments (any kids enrolled by themselves?)
 - o Duplicate or erroneous enrollments (ask the Helpdesk to delete!)
 - o Missing data/no exit interview (high missing rates cause errors in reporting process)
 - o Missing Exits/Abandoned Enrollments for Night-by-Night Emergency Shelters (causes LSA error!)



What's the issue?

- Early LSA submissions have flagged quite a few data quality errors or warnings
- Several parties have noted multiple agencies creating duplicate client records



Duplicate Enrollments

•

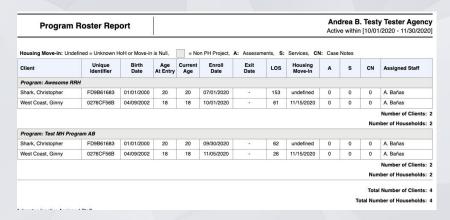
- These can occur for a variety of reasons including:
 - Returning clients are enrolled with incorrect start dates, making it look like two separate enrollments are duplicate enrollments.
 - Start or end dates on an enrollment get edited to overlap each other.
 - Rather than removing an exit date to reopen an enrollment, users sometimes create a new enrollment with the same or similar start date.
 - Multiple staff entering enrollments for clients without checking the client's history to see whether they've already been enrolled.
 - Client merges that result in enrollments for both clients are assigned to the remaining client, which can result in duplicate enrollments.



Identifying Duplicate Enrollments

 Run Program Roster Report [GNRL-106] at least once a month

- If you have Data Analysis Access:
 - Run a query to identify clients with duplicate enrollments
 - Unsure of how to run a query for this? Contact the Helpdesk





Correcting Duplicate Enrollments

- When ready to fix the duplicate enrollment(s)
 - Decide which enrollment you want to keep. You can always change enrollment dates and update information, so if you're
 comparing enrollments and one has annual assessments, family members, and clients notes, while the other has only enrollment
 screen information, you should keep the more detailed one (Need to compare enrollment data? Use the [GNRL-220] Program
 Details report.)
 - Update the target enrollment (the one you want to keep) with any missing information from the duplicate enrollment (again, the [GNRL-220] Program Details report can help).
 - Once you've updated any details and moved any services, the duplicate enrollment can be deleted by contacting the Helpdesk.



Identifying Duplicate Clients

- Duplicate clients often have a combination of the same name, Social Security number, birthdate, etc.
- Run [DQXX-110] Duplicate Clients at least once a month.
 - More about this report later in the presentation

<u></u>	Unique Identifier	Name	SSN	Date Of Birth
	E5597309	Lee, Sarah	xxx-xx-3434	08/15/1980
	C3E0E484	Lee, Sarah	xxx-xx-3434	08/15/1980



Correcting Duplicate Clients

Connect with the Help Desk (please don't attempt to merge!)

Provide the following:

- Unique IDs of records in need of merging
- Identify which is the "primary" record
 - Usually the one with more complete information (more enrollments, services, or the most recent record created).



What happens after duplicate client records are meged?

- Any program enrollments, services, notes, public alerts, files, locations, assessments, and referrals in the secondary client record(s) are transferred to the "primary" record and display in their corresponding tabs and/or the client history tab.
- The unique ID from the secondary record(s) will show under the Alias field and are searchable.
- If any profile data is different only the primary record data is retained



Report Spotlight Review: [DQXX-110] Duplicate Clients



Report Spotlight Review: [DQXX-110] Duplicate Clients

Provides a list of clients enrolled in one of your projects who may have a duplicate record.

To run the [DQXX-110] Duplicate Clients Report:

- Navigate to the Report Library
- Locate [DQXX-110] Duplicate Clients under the Data Quality Reports section
- Choose the Program(s) you wish to include in the report.
- Select active clients or enrolled clients
- Enter the start and end dates for the report
- Click OK

14	Unique Identifier	Name	SSN	Date Of Birth
	E5597309	Lee, Sarah	xxx-xx-3434	08/15/1980
	C3E0E484	Lee, Sarah	xxx-xx-3434	08/15/1980





- Please do a regular audit of staff user accounts.
- User accounts should be deactivated for staff who no longer work at your agency.
 - It is recommend that you contact the Help Desk within 72 hours of staff termination
- Staff who continue to work at your agency, but no longer use the ONE System should be deactivated.

This is important because it ensures client privacy and the security of the ONE System. As such we need to know when staff leave, or when it's necessary to change staff access levels.

How to monitor your user accounts:

- Each month, review the [DQX-103] Monthly Staff Report sent to your email
 - If you're not currently receiving this, please let us know
 - This report can also be accessed through the Report portal

Monthly Staff Report		[TRAINING] System		
This report is an auto Please note, this is a Clarity.	mated monthly review of your staff participation in Clarity Active Staff - No Activity			
Clarity.	Name	Last Log	in Days Inactive	
	Adra	12/02/202	20 29	
	Ba ea	12/02/202	20 29	



For any changes to user accounts or to deactivate a user, please contact the Helpdesk via the Helpdesk widget in the ONE System, by calling 415.429.4211 or at OneSF@bitfocus.com.



Announcements



Announcements

• If you missed the Family Coordinated Entry workflow training, you can <u>review the two-day training here</u>.

Content from Clarity Connect available now.

• The new ONE Support website will go live on December 18th. We would love your feedback! You can email Andrea (andreab@bitfocus.org) or Sara (sarah@bitfocus.org).

Helpful Resources

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

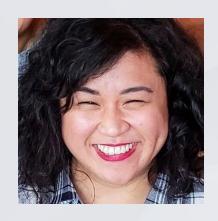
Bitfocus Helpdesk onesf@bitfocus.com 415.429.4211



Thank You From Your SF Team!



Ja Eun Guerrero
Huh, LCSW
Senior Project
Administrator



Andrea Bañas Deputy Project Administrator



Sara Hoffman Project Manager