

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.

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:
 - HoH designation and family/group enrollments (any kids enrolled by themselves?)
 - Duplicate or erroneous enrollments (ask the Helpdesk to delete!)
 - Missing data/no exit interview (high missing rates cause errors in reporting process)
 - Missing Exits/Abandoned Enrollments for Night-by-Night Emergency Shelters (causes LSA error!)

Duplicate Enrollments and Clients

Duplicate Enrollments and Clients

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 and Clients

Duplicate Enrollments

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- 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.

Duplicate Enrollments and Clients

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

Program Roster Report										Andrea B. Testy Tester Agency			
										Active within [10/01/2020 - 11/30/2020]			
Housing Move-in: Undefined = Unknown HoH or Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes													
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	
Program: Awesome RRH													
Shark, Christopher	FD9B61683	01/01/2000	20	20	07/01/2020	-	153	undefined	0	0	0	A. Bañas	
West Coast, Ginny	0276CF56B	04/09/2002	18	18	10/01/2020	-	61	11/15/2020	0	0	0	A. Bañas	
												Number of Clients: 2	
												Number of Households: 2	
Program: Test MH Program AB													
Shark, Christopher	FD9B61683	01/01/2000	20	20	09/30/2020	-	62	undefined	0	0	0	A. Bañas	
West Coast, Ginny	0276CF56B	04/09/2002	18	18	11/05/2020	-	26	11/15/2020	0	0	0	A. Bañas	
												Number of Clients: 2	
												Number of Households: 2	
												Total Number of Clients: 4	
												Total Number of Households: 4	

Duplicate Enrollments and Clients


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.

Duplicate Enrollments and Clients

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

	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

Duplicate Enrollments and Clients

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).

Duplicate Enrollments and Clients

What happens after duplicate client records are merged?

- 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

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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

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User Accounts

User Accounts

- 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.

User Accounts

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 automated monthly review of your staff participation in Clarity.

Please note, this is a
Clarity.

Active Staff - No Activity

Name	Last Login	Days Inactive
Ad [REDACTED] adra	12/02/2020	29
Be [REDACTED] ea	12/02/2020	29

User Accounts

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 [review the two-day training here](#).
- [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**