San Francisco ONE System
Agency Lead Meeting

June 27, 2022

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TODAY'S AGENDA

Welcome

Survey Results

Access Roles

Roster Report

Announcements

Resources

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WELCOME!

If you could bring back a fashion trend, what would it be and why?
Please share name, pronouns, and agency when responding.

SURVEY RESULTS

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ACCESS ROLES

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ACCESS ROLES

A recent update to Access Roles was released and posted for your reference on the ONESF Support Site. (onesf.bitfocus.com)

In the update, you will be able to review:

- Access Roles and Summaries
- Workflows and the appropriate role
- Access Role Permissions

ACCESS ROLE NAME	ACCESS ROLE FUNCTIONALITY
Front Line Staff	This access role has the most limited functionality. Users with this access role are typically Front Line Staff working at a desk or reception area in a program or housing site. Front Line Staff will have the ability to view the client profile page, services and location.
VSP (Only designated VSP agencies Asian Women's Shelter, Safe House, and St. Vincent De Paul-Confidential)	VSP will have the ability to see the client profile page, history, report library and cannot enter any data into ONE. This access role has the most limited functionality.
Property Managers	This is a very restricted access role, usually for users who work in property management and manage openings for a housing portfolio.
Shelter Staff	Users with this access role may need to enter shelter reservation information in ONE. Staff will have limited access to client information. They will have the same access as Front Line Staff and VSP, with the additional ability to view the programs tab, run reports and use the attendance tool.
Shelter Staff + Client Referrals	This access role has the same level of functionality as the **Shelter Staff** access role, but also has access to program referrals.
Shelter Case Manager	This access role is for users who will be providing case management/direct services to clients staying in a shelter. Staff will be able to access all client level information except the assessment tab. This access role has the ability to run reports and use the attendance tool.
Shelter Case Manager + Client Referrals	This access role has the same level of functionality as the **Shelter Case Manager** access role, but also has access to program referrals.
Housing Program Manager	Housing staff in this role may be responsible for posting open units, processing housing referrals (accepting or denying the referral). Staff will be able to access all client level information except the assessment tab. Please note that if staff complete Annual Assessments (or oversee programs that

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When requesting a new user account, it's important to review the Access Role and Workflow document to identify the appropriate Access Role for your team.

Each Access Role has its own capabilities, allowing users to utilize and share information in the ONE System to best support participants.

DEPARTMENT OF HOMELESSNESS AND SUPPORTIVE HOUSING

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Access Roles

The following chart is a visualization of the Access Roles and the functions in ONE System they will have permissions to view and/or use.

Access Role	ONE Functions										
	Client Profile	History	Services	Programs	Assessments	Notes	Files	Location	Referrals	Reports	Data Analysis
Front Line Staff	x		x					x			
VSP	x	x	x	x	x		x			x	x
Property Managers	x			x			x		x		
Shelter Staff	x		x	x						x	
Shelter Staff + Client Referrals	x		x	x					x	x	
Shelter Case Manager	x	x	x	x		x	x	x		x	
Shelter Case Manager + Client Referrals	x	x	x	x		x	x	x	x	x	
Housing Program Manager	x	x	x	x		x	x	x	x	x	
Program Supervisor	x	x	x	x	x	x	x	x		x	
Access Partner	x	x	x	x	x	x	x	x		x	
Street Outreach	x	x	x	x	x	x	x	x		x	
SF HOT Navigator	x	x	x	x	x	x	x	x		x	
Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Agency Lead Data	x	x	x	x	x	x	x	x	x	x	x
Back-up Agency Lead	x	x	x	x	x	x	x	x	x	x	x
Access Point Staff	x	x	x	x	x	x	x	x	x	x	x
Access Point Manager/Vets BNL Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Agency Manager	x	x	x	x	x	x	x	x	x	x	x
Housing Case Management	x	x	x	x	x	x	x	x	x	x	x
Navigation Case Management (Assessment)	x	x	x	x	x	x	x	x	x	x	x
HSH Analyst*	x	x	x	x	x	x	x	x	x	x	x
HSH Staff*	x	x	x	x	x	x	x	x	x	x	x
HSH Matchmaking*	x	x	x	x	x	x	x	x	x	x	x
HSH Staff Data*	x	x	x	x	x	x	x	x	x	x	x
*Only for HSH staff											

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ACCESS ROLES

What to include when requesting a New User Account:

STAFF NAME

STAFF EMAIL

ACCESS ROLE

ACCESS ROLES

"How do I request a new User Account for my team?"

All New User Requests must come from the Agency Lead.

Prior to requesting a New User Account, you can ensure your team has what they need for you to submit the request and have their account setup as soon as possible.
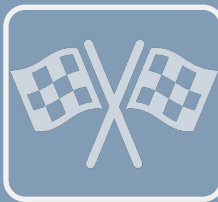
Training
- Clarity Human Services
- SFDPH Privacy Training
- Additional Training if Required

Review
- Confirm which Access Role the user will require by reviewing the Access Role Summary.

Contact Bitfocus!
- Email the information to the Bitfocus Help Desk at onesf@bitfocus.com, or contact your Community Administrator at onesf-admin@bitfocus.com

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DATA QUALITY CLEAN UP

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DATA QUALITY CLEAN UP

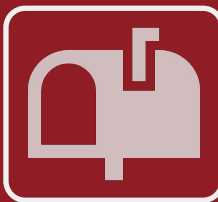In preparation for upcoming roster asks for the following agencies and sites [insert list above] , we ask that you do some prep-work on your end to make sure that your enrollments, rent rolls and rosters are as accurate as possible to avoid as many data entry errors as possible prior to collecting this information from you at a later date.

Abode	Community Forward	Concord House	ECS	Mary Elizabeth Inn	THC
•Verona Hotel	•Coronado Hotel	•Aranda Hotel •McAllister Hotel	•Alder Hotel •Crosby Hotel •Elm Hotel •Hillsdale Hotel •Mentone Hotel •Henry Hotel	•Mary Elizabeth Inn	•All Star Hotel •Boyd Hotel •Graystone Hotel •Pierre Hotel •Elk Hotel •Raman Hotel •Royan Hotel •Union Hotel •Hartland Hotel •Mission Hotel •Seneca Hotel •Vincent Hotel

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DATA QUALITY CLEAN UP

Helpful Reports

[HUD-227] Annual Performance Report
[HUD -225] HMIS Data Quality Report
[GNRL -220] Program Details Report
[GNRL-106 Program Roster

ROSTER REPORT

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ROSTER REPORT

[GNRL-106] Program Roster

This report provides information for the following data elements:

- Client
- Unique Identifier
- Birth Date
- Age At Entry
- Current Age
- Enroll Date
- Exit Date
- LOS (Length of Stay)
- Housing Move-in (Date)
- A (Assessments)
- S (Services)
- CN (Case Notes)

Program Roster Report | **Demo Agency**
Active within 06/01/2019 thru 06/01/2022

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, ☐ = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Zion Housing												
Mouse, Malia	33347CB86	01/02/2018	1	4	02/01/2019	-	1,217	undefined	0	0	0	S. Jones*
Mouse, Minnie	471CA3370	01/25/1985	33	37	11/11/2018	-	1,299	11/11/2018	0	1	0	S. Jones*
Tree, Pine	61F0D4B00	06/04/2011	9	11	06/25/2020	-	707	undefined	0	0	0	S. Hoffman
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	33	10/26/2020	-	584	10/26/2020	0	0	0	S. Hoffman
West Coast, Ginny	0276CF56B	04/09/2002	18	20	10/30/2020	-	580	11/15/2020	0	0	0	A. Banas
General, George	16764155B	04/26/1955	65	67	02/19/2021	04/15/2021	55	02/19/2021	0	0	0	S. Hoffman
Doe, Danny	F1D1FDADE	04/29/2000	20	22	02/19/2021	03/19/2021	28	02/19/2021	0	0	0	S. Hoffman

Number of Enrollments: 7
Number of Unique Clients: 7
Number of Households: 6

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ANNOUNCEMENTS

OFFICE HOURS:
- **Tuesday June 28 @ 2p**
- **Tuesday July 26 @ 2p**

Register | HERE

AGENCY LEADS MEETING:
- **Monday July 25 @ 10:30a**

Register | HERE

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Helpful Resources

ONESF Help Center Website

https://onesf.bitfocus.com

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211

Thank You From Your SF Team!

Regina Abadajos
Community Project
Administrator