



Monthly Agency Leads Meeting

San Francisco, July 2024

Today's Agenda

Welcome!

System Updates

Data Analysis: Active User Report

Release of Information (ROI) Management in ONE

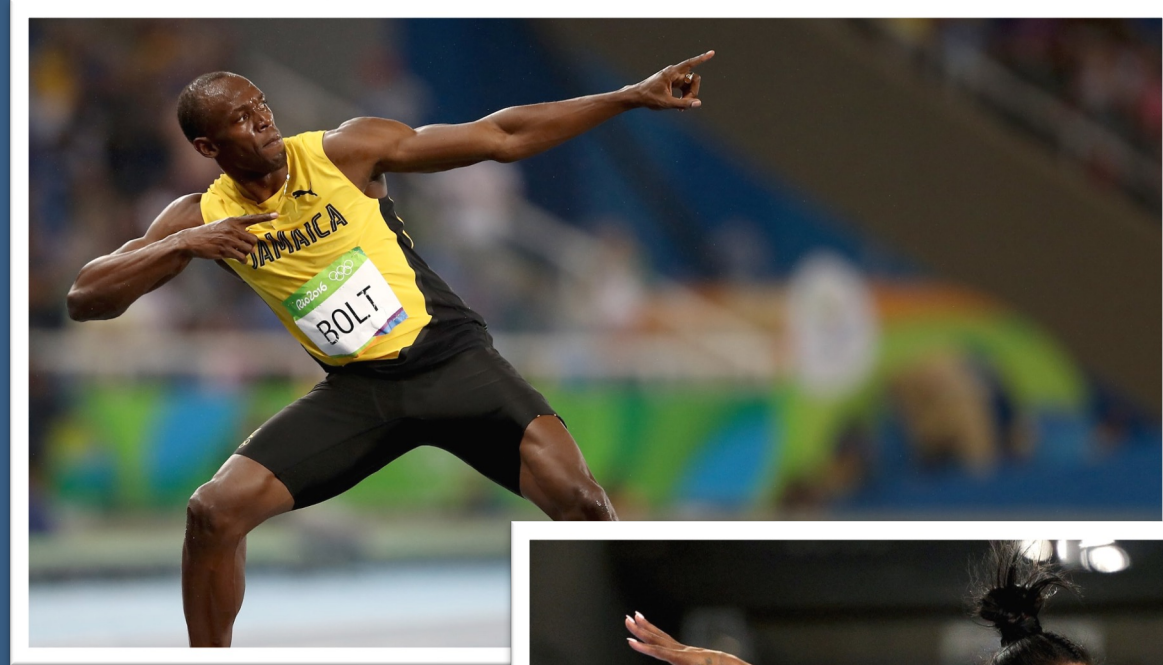
ONE System Reports: Staff Client Data Activity

Office Hours Reminder

Welcome!

What Olympic Sport would you star in?

--> Please share your name, pronouns, and agency when responding.



System Updates

--->SF Shelter ULI Project

--->Trainings for Congregate and Non Congregate Shelters held in June can be found here: <https://onesf.bitfocus.com/temporary-shelter>

--->New **Active User Report** now available in the Data Analysis section of the ONE System Reports tab





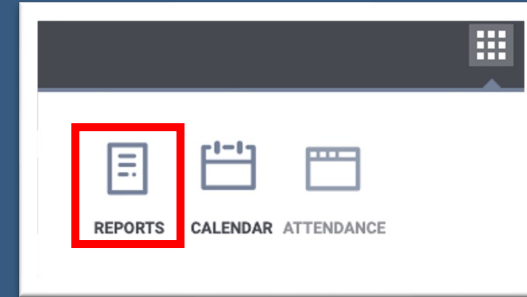
Data Analysis: Active Users Report

Data Analysis Active Users Report

Shows all active users within an agency and details of their account.

Will only show information for the agency you are under. Can only one run agency at a time.

- Will show staff based on the user's **primary agency**.

A screenshot of the 'Tenderloin Housing Clinic' Data Analysis page. The page has a dark header with the title 'Tenderloin Housing Clinic' and navigation links 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'DATA ANALYSIS' link is highlighted with a red square. Below the header is a section titled 'DATA ANALYSIS' with a list of report categories and their counts:

Report Category	Count
Built In Reports	0 report(s) ↓
San Francisco ONE System Reports	83 report(s) ↓
Tenderloin Housing Clinic Reports	2 report(s) ↑

Home

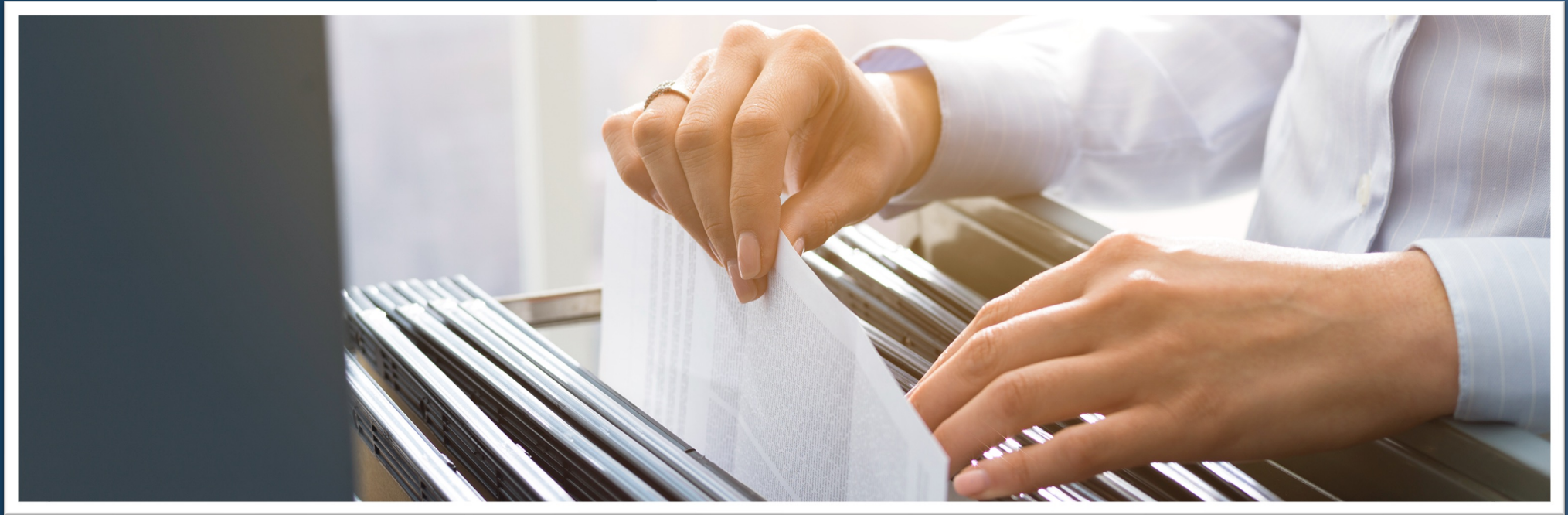
Active Users Report ⊙ RUN

Data Analysis Active Users Report

Active Users Report just now

Active Users Report

	Agency Name	Username	Full Name	Email	Primary Access Role	Status	Last Visited Date
1	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-17
2	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-17
3	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-12
4	Tenderloin Housing Clinic				Agency Lead - Inventory	Active	2024-07-15
5	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-15
6	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-18
7	Tenderloin Housing Clinic				Property Manager	Active	2024-07-19
8	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-19
9	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-19
10	Tenderloin Housing Clinic				Agency Lead - Inventory	Active	2024-07-18
11	Tenderloin Housing Clinic				Property Manager	Active	2024-07-19
12	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-16
13	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-16
14	Tenderloin Housing Clinic				Property Manager	Active	2024-07-19
15	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-18
16	Tenderloin Housing Clinic				Property Manager	Active	2024-07-17
17	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-17
18	Tenderloin Housing Clinic				Property Manager	Active	2024-06-27
19	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-17
20	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-06-24
21	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-16
22	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-05-29
23	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-02
24	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-15
25	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-17
26	Tenderloin Housing Clinic				Housing Program Manag...	Active	2024-07-19



Release of Information (ROI) Management in ONE

Homeless Response System Release of Information

- > Explains how client information is collected in the ONE System, as well as how that info is used by or shared to housing and service providers
- > Must be signed by the client and uploaded into the ONE system
- > If a client refuses to provide consent, a ONE system profile may not be created



San Francisco Department of Homelessness & Supportive Housing

Homelessness Response System Authorization for Use or Disclosure of Information

This form and the attached notice describe how personal information about you may be used and shared by the City and County of San Francisco's Department of Homelessness and Supportive Housing (HSH) and its provider organizations, and the rights you have about your information.

The San Francisco Department of Homelessness and Supportive Housing's (HSH) Online Navigation and Entry (ONE) System (the City's Homeless Management Information System) is a database that allows HSH to save, access, and share client level information with our Partner agencies, which are San Francisco City Departments, including the Department of Public Health and the Human Services Agency, and other community-based housing and service providers who work with people experiencing, or at risk of experiencing, homelessness. Examples include the SF Homeless Outreach Team (SFHOT) or service providers in supportive housing.

To be able to best help you, information is collected in the ONE System and used by or shared with Partner agencies. Partner agencies use the information in the ONE System to:

- Match clients to appropriate housing and other services they might be able to receive
- Improve coordination of your care and related services between City agencies and providers: and

ROI Compliance in ONE

--> Must be updated every 3 years

--> All those serving the client are responsible for ensuring ROIs are up-to-date

--> Permanent housing programs should be sure to keep tenant ROIs updated

--> Yellow banner will appear at the top of client profile when ROI is missing or expired

▲ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.

--> To maintain compliance, each client profile must have an up-to-date & active ROI recorded both as:

1. A **file** uploaded into client profile
2. An **electronic signature** recorded in Client Privacy section of client profile (shield icon)



ROI Resources

- > [Online ROI Resources and Forms \(available in English, Chinese, Spanish, Tagalog\)](#)
- > [Bitfocus Help Desk Article: Release of Information Overview](#)



ONE System Reports:

Staff Client Data Activity

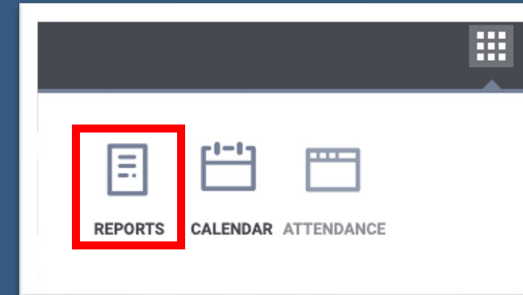
Staff Client Data Activity

This report lists the responsible staff assigned to each program in ONE.

--->Can be found under Reports -> Report Library -> Agency Management Reports

--->Available to all users with access to the Agency Management reports.

--->Results limited to agencies the user has access to



Agency Management	
[STFF-101] User Activity Report	★ ⏪ RUN
[STFF-103] User Active Caseload	★ ⏪ RUN
[STFF-104] Staff Client Data Activity Report	★ ⏪ RUN
[STFF-106] User Client Note Hours Tracked	★ ⏪ RUN

Staff Client Data Activity

REPORT LIBRARY

Agency Management > [STFF-104] Staff Client Data Activity Report

Staff(s)
All

Data Type(s)
All
Assessment
Client Contact Created
Client Contact Edited

Deleted Option Not deleted Deleted only All

Report Date Range -

Report Output Format Web Page PDF Zip with XLSX

Note: If the report contains more than 40,000 rows, the Report Output Format will be automatically changed to Zip with XLSX

SUBMIT

This report lists staff activity in ONE related to a client's record

--->Sorted by staff member.

--->Includes activity type, client UI and date and time the activity occurred.

--->Specific activity type can be filtered

--->Report has an option to show deleted data and will show when/if a staff member has deleted data.

Staff Client Data Activity

Staff Client Data Activity Report		Staff members are listed below	
		Date Range: 02/01/2021 thru 02/28/2021	
Staff/Last Name, First Name			
Data Type	Client Name	Unique Identifier	Date/Time
Profile Created	[REDACTED]	[REDACTED]	02/16/2021 12:27 AM
Profile Edited	[REDACTED]	[REDACTED]	02/14/2021 9:06 AM
Total: 2			
[REDACTED]			
Data Type	Client Name	Unique Identifier	Date/Time
<i>No data to display...</i>			
[REDACTED]			
Data Type	Client Name	Unique Identifier	Date/Time
Profile Edited	[REDACTED]	[REDACTED]	02/28/2021 9:30 AM
Profile Edited	[REDACTED]	[REDACTED]	02/25/2021 3:32 PM
Profile Edited	[REDACTED]	[REDACTED]	02/25/2021 3:32 PM
Profile Edited	[REDACTED]	[REDACTED]	02/24/2021 6:50 PM
Profile Edited	[REDACTED]	[REDACTED]	02/24/2021 6:26 PM
Client Contact Created	[REDACTED]	[REDACTED]	02/23/2021 7:11 AM
Profile Edited	[REDACTED]	[REDACTED]	02/18/2021 12:19 PM
Profile Edited	[REDACTED]	[REDACTED]	02/17/2021 3:59 PM

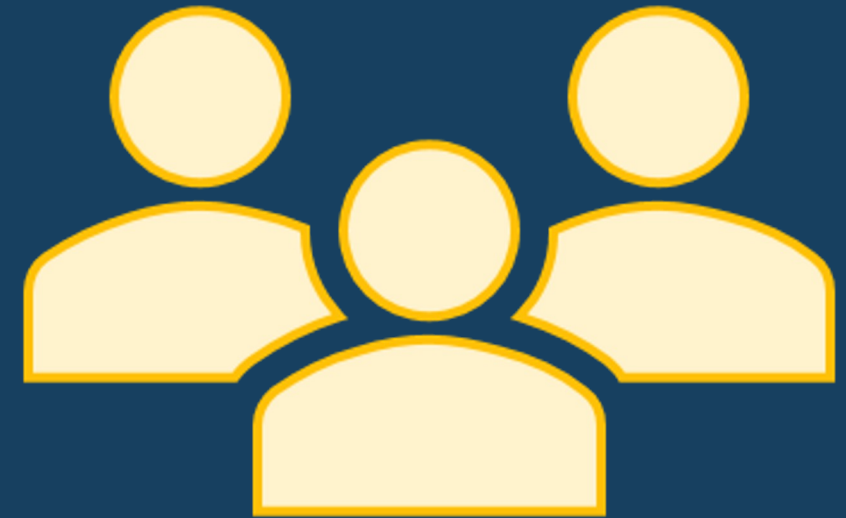
Announcements

Monthly Office Hours:

- Jul 23 @ 2 pm
- Aug 27 @ 2 pm

Next Agency Leads Meetings:

- Aug 26 @10:30 am
- Sep 24 @10:30 am



Registration Links: onesf.bitfocus.com

Helpful Resources



ONESF Help Center Website

- onesf.bitfocus.com

Bitfocus Help Center

- help.bitfocus.com

Bitfocus Helpdesk

- onesf@bitfocus.com
- 415.429.4211

Thank You From Your SF Team!



Holly Aversano
Senior Project
Administrator
hollya@bitfocus.com



Paul Devencenzi
Deputy Project
Administrator
pauld@bitfocus.com