



Compass 90-day UAV Program

ONE System Training

AGENDA

Welcome!

Posting Program Openings

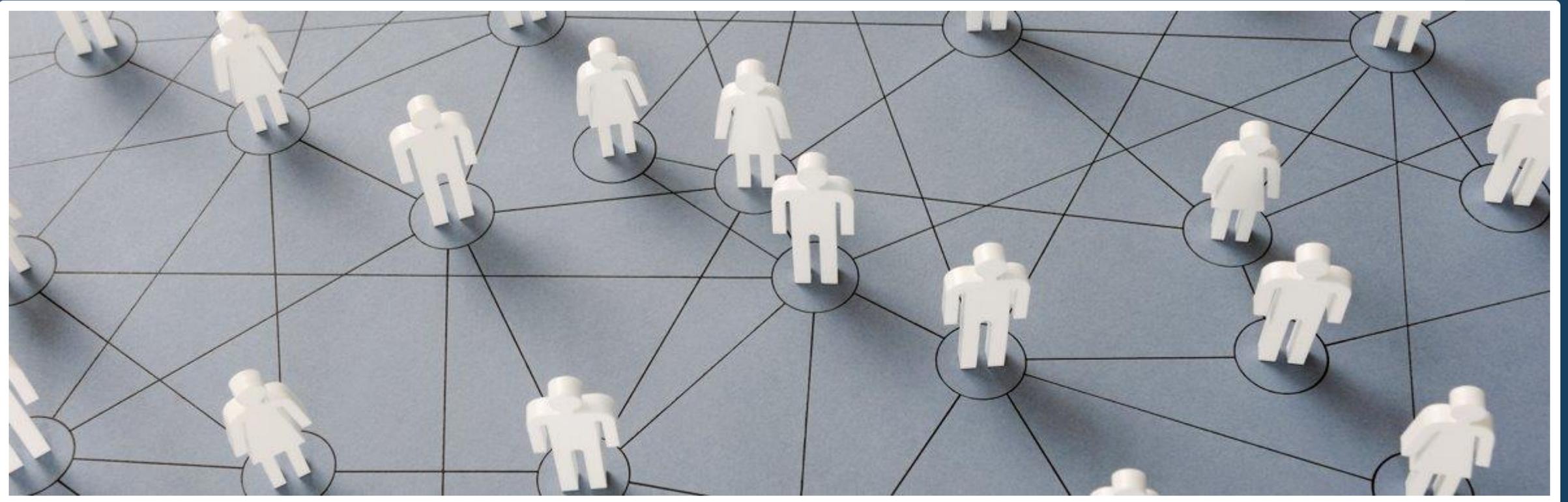
Processing Referrals

Program Enrollments

Program Exits

Helpful Reports

Wrap-up & Questions



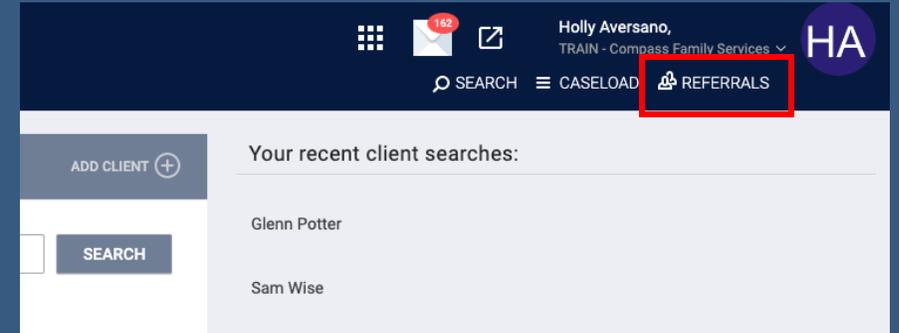
Posting Program Openings

Posting Openings

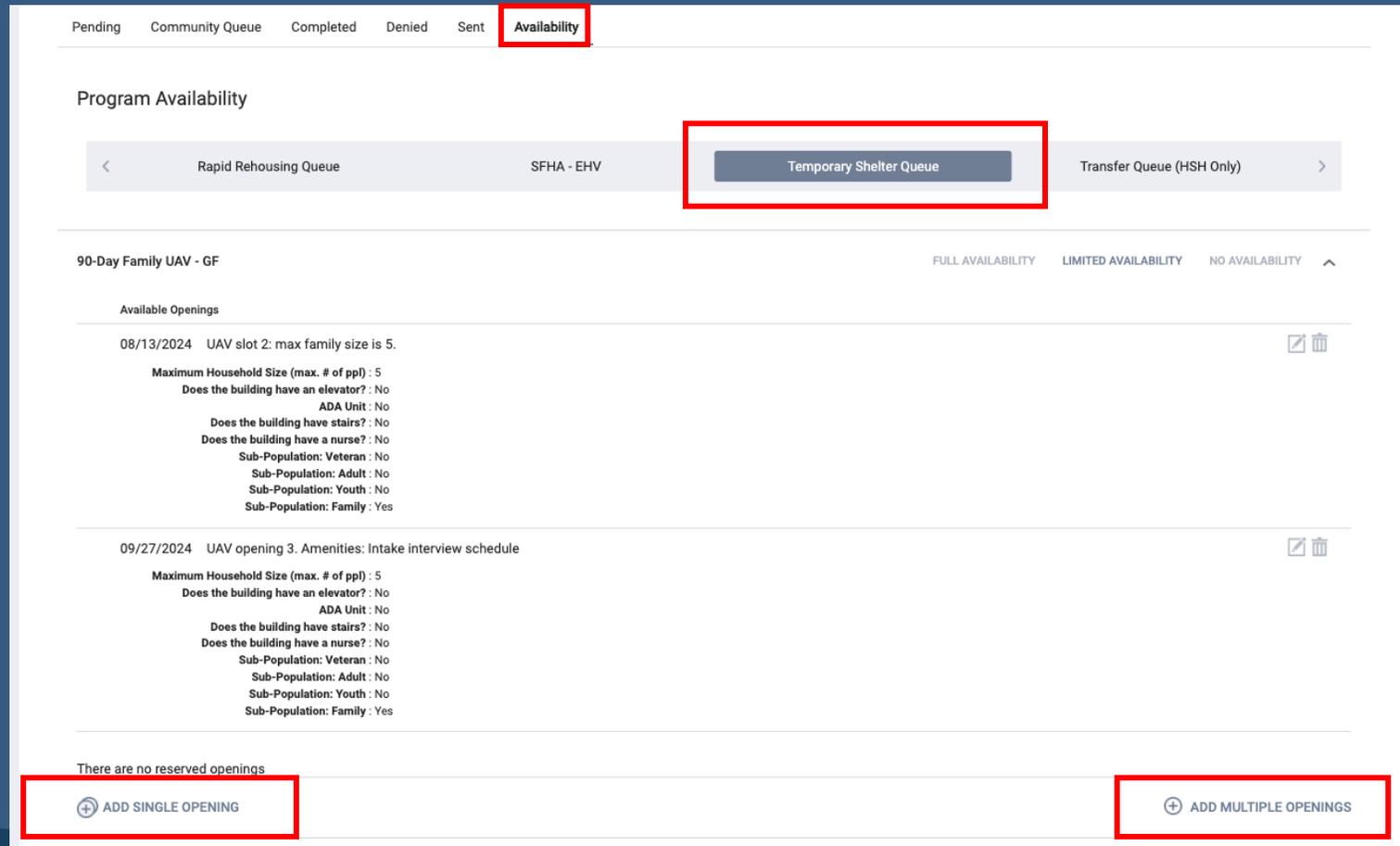
---> Post an opening to begin receiving referrals for program slots

---> To post a program opening:

1. Go to **Referrals** tab in top right corner of Search page
2. Click on the **Availability** tab
3. Find and click on the **Temporary Shelter Queue**
4. Click on the **90-Day Family UAV - GF** program
5. Click **Add Single Opening** OR **Add Multiple Openings**



Navigation bar showing user profile (Holly Aversano, TRAIN - Compass Family Services) and tabs: SEARCH, CASELOAD, REFERRALS (highlighted).



Program Availability section showing tabs: Pending, Community Queue, Completed, Denied, Sent, Availability (highlighted).

Program Availability: Rapid Rehousing Queue, SFHA - EHV, Temporary Shelter Queue (highlighted), Transfer Queue (HSH Only)

90-Day Family UAV - GF (FULL AVAILABILITY, LIMITED AVAILABILITY, NO AVAILABILITY)

Available Openings:

- 08/13/2024 UAV slot 2: max family size is 5.
Maximum Household Size (max. # of ppl) : 5
Does the building have an elevator? : No
ADA Unit : No
Does the building have stairs? : No
Does the building have a nurse? : No
Sub-Population: Veteran : No
Sub-Population: Adult : No
Sub-Population: Youth : No
Sub-Population: Family : Yes
- 09/27/2024 UAV opening 3. Amenities: Intake interview schedule
Maximum Household Size (max. # of ppl) : 5
Does the building have an elevator? : No
ADA Unit : No
Does the building have stairs? : No
Does the building have a nurse? : No
Sub-Population: Veteran : No
Sub-Population: Adult : No
Sub-Population: Youth : No
Sub-Population: Family : Yes

There are no reserved openings

Buttons: ADD SINGLE OPENING (highlighted), ADD MULTIPLE OPENINGS (highlighted)

Posting Openings (cont)

After clicking to add a single opening or multiple openings, you will be prompted to fill out a form

→ Be sure to fill out as completely and accurately as possible

→ Helps to ensure accurate referrals

→ Click Save Changes to officially post referral

Tip: Add Multiple Openings if you have multiple slots that are available with the same or similar attributes

ADD AN OPENING

Date 

Additional Notes

Unit Number

Unit Size (# of bedrooms)

Minimum Household Size (min. # of ppl)

Maximum Household Size (max. # of ppl)

What floor is the unit on?

Does the building have an elevator?

ADA Unit

Does the building have stairs?

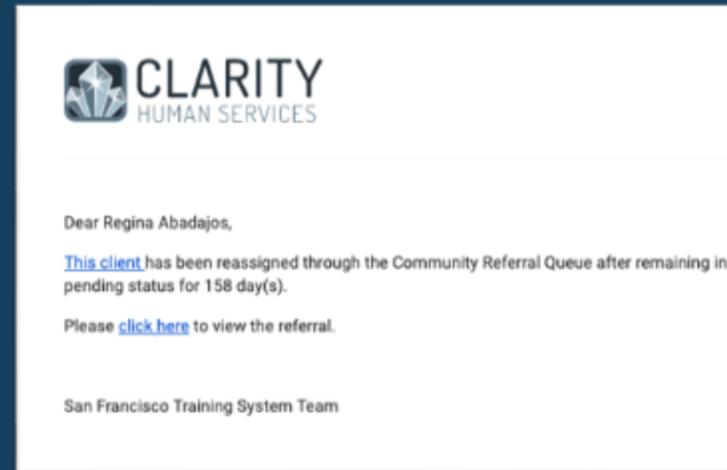
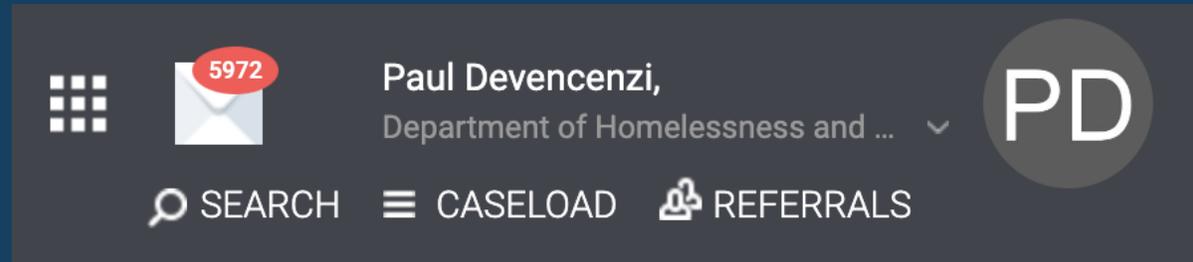
Is the unit wheelchair accessible?

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		



Processing Referrals

Processing Referrals: Referral Notifications



- You will receive a notification via email and Clarity Inbox when a referral has been sent to your program
- *If you would like to ensure that you receive referrals, please reach out to the Bitfocus Help Desk at onesf@bitfocus.com*

SEARCH FOR A CLIENT

ADD CLIENT +

Enter search terms for a client

SEARCH

Use full name, partial name, date of birth or any combination.

Your recent client searches:

- Glenn Potter
- Sam Wise

- Referrals are processed from 'Referrals' dashboard on the homepage
- Referrals will be editable through 'Pending' tab

REFERRALS

Pending Community Queue Completed Denied Sent Availability

Pending Referrals

Search _____ Mode Standard

Sort By Default -- Select --

Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
Alice Wonderland Program: 90-Day Family UAV - GF Referred by: TRAIN - San Francisco Family Coordinated Entry Agency	09/27/2024	Reassigned	18 total 0 pending

Processing Referrals: Pending – In Process

- ‘Pending – in Process’ = when you want to acknowledge a referral but aren’t ready to make an enrollment (i.e. you’re in communication with referring agency to intake the client)
- To acknowledge the referral, change referral status from ‘Pending’ to ‘Pending – in Process’

REFERRAL: EDIT

Client	Alice Wonderland
Referred Program	90-Day Family UAV - GF
Referred Program Opening	08/13/2024 UAV slot 2: max family size is 5.
Referred to Agency	TRAIN - Compass Family Services
Referring Agency	TRAIN - San Francisco Family Coordinated Entry Agency
Referred Date	09/27/2024
Days Pending	18 day(s)
In Process	0 day(s)
Qualified	Reassigned
Family Shelter score	1
Referred by Staff	Holly Aversano
Case Manager	Select
Last Activity	10/15/2024 CHECK-IN
Current Status	Pending <input checked="" type="checkbox"/>
Status Date	10/15/2024
New Status	<div style="border: 1px solid #ccc; padding: 5px;"><input checked="" type="checkbox"/> Pending <input type="checkbox"/> Pending - In Process <input type="checkbox"/> Denied <input type="checkbox"/> Expired</div>
Private	<input type="checkbox"/>

SAVE CHANGES **CANCEL**

Alice Wonderland

Program: 90-Day Family UAV - GF

Referred by: TRAIN - San Francisco Family Coordinated Entry Agency

- Referral color will change to green when status is changed to ‘Pending - in Process’
- *Referrals must be changed to ‘Pending - in Process’ within 90 days, or else they will auto-expire*

Processing Referrals: Denying a Referral

- When you need to deny a referral, change the status of the referral to **Denied**
- Four additional fields will populate that need to be answered
 - **Send to Community Queue:** Yes/No
 - **Denied By Type:** Provider/Client
 - **Denied Reason:** Reason for the denial
 - **Denial Information:** Provide additional details explaining the reason for the denial

Status **Denied** ▼

Send to Community Queue -- Select -- ▼

Denied By Type -- Select -- ▼

Denied Reason Select ▼

Denial Information

Private

SAVE CHANGES CANCEL



Program Enrollments

Program Enrollments

- Enrolling a client into your program accepts the Community Queue Referral
- Be sure to:
 - Keep toggle on to link referral to program enrollment
 - Toggle to include family members as appropriate

Alice Wonderland

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

CLIENT PROFILE

90-Day Family UAV - GF

Program Description:
This is a 90 day voucher based program. Max capacity is 5. (check with Lashenna for language on program description)

Active Clients

2 CLIENTS

- 100 % Families
- 0 % Individuals

Occupancy (Today)

1 UNIT

- 1 % Checked In
- 0 % Reserved
- 99 % Available

Referrals (90 Days)

2 REFERRALS

- 50 % Referrals Pending
- 50 % Referrals Connect
- 0 % Referrals Denied

Funding Source: Local or Other Funding Source (Please Specify)

Availability: Limited Availability

Service Categories:

- Housing Search and Placement
- Other

HOUSING AVAILABILITY:

Households with at least one adult and one child 240 Beds in 80 Units

1 pending referral(s). Oldest 18 days.

Program Placement a result of Referral provided by TRAIN - San Francisco Family Coordinated Entry Agency

Include group members:

- Mister Peanut

PRINT DIRECTIONS

ENROLL

Program Enrollments: Enrollment Form



When enrolling a client, please keep in mind...

- Client information may cascade forward from other program enrollments - it's important to always confirm that all details are still up-to-date and accurate, and to update if necessary

How do I know if I enrolled my household correctly?

- Tip: Check the program enrollment under the 'Programs' tab
 - If the enrollment has a link symbol, you can be sure that the enrollment is linked to the referral

Program Name	Start Date	End Date	Type	
90-Day Family UAV - GF Emergency Shelter – Entry Exit TRAIN - Compass Family Services ⓘ	10/15/2024	Active	Group	

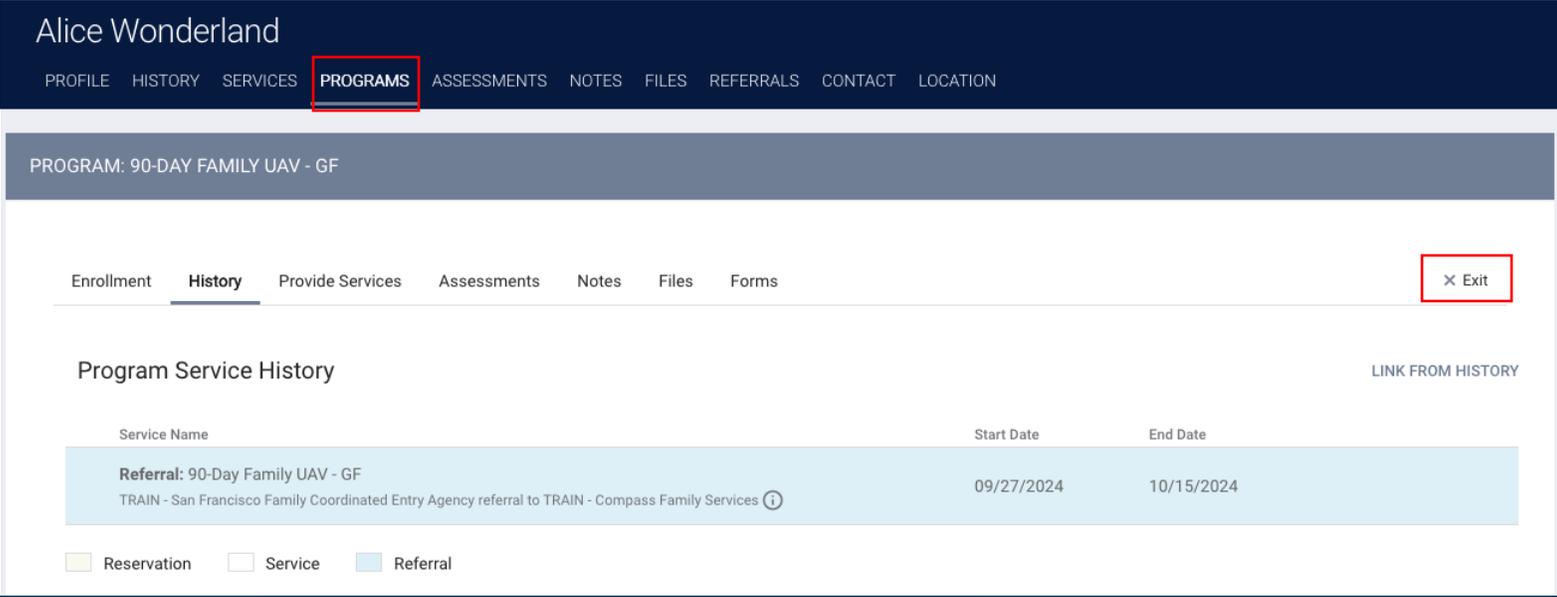


Program Exits

Program Exits

When client leaves your program, record the exit in ONE:

1. Click on 'Programs' tab
2. Click on the  icon to open the program
3. Click on the 'Exit' button in the top right-hand corner
4. Toggle to include all appropriate family members in exit
5. Review cascaded information
6. Scroll down and click 'Save & Close' to save changes



Alice Wonderland

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES REFERRALS CONTACT LOCATION

PROGRAM: 90-DAY FAMILY UAV - GF

Enrollment **History** Provide Services Assessments Notes Files Forms × Exit

Program Service History LINK FROM HISTORY

Service Name	Start Date	End Date
Referral: 90-Day Family UAV - GF TRAIN - San Francisco Family Coordinated Entry Agency referral to TRAIN - Compass Family Services ⓘ	09/27/2024	10/15/2024

Reservation Service Referral

Exit Form: Exit Reason and Exit Destination

End Program for client Alice Wonderland

Program Exit Date	10/15/2024	
Exit Reason	Select	▼
Destination	Select	▼

- Important data elements to help system understand what happens to clients upon exiting a program
- Complete as accurately as possible for each client exiting your programs



Helpful Reports

REPORT LIBRARY

Favorite Reports

Data Quality Reports

Administrator Reports

Service Based Reports

Program Based Reports

Assessment Based Reports

Profile Screen Reports

Housing

HUD Reports

Community and Referrals

Agency Management



Regina Abadajos,
Demo Agency ▾



SEARCH CASELOAD

4 report(s) ▾

6 report(s) ▾

19 report(s) ▾

13 report(s) ▾

19 report(s) ▾

4 report(s) ▾

1 report(s) ▾

5 report(s) ▾

7 report(s) ▾

8 report(s) ▾

4 report(s) ▾

Launch Pad: Report Library

Report Queue: Shows processing and completed reports.

Program Roster

[GNRL-106] Program Roster (Program Based Report)

- Gives information on clients who have stayed or are currently staying in your program

Program Roster Report										Demo Agency		
										Active within [12/01/2019 - 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: Arches Navigation Center												
Fever, Cedar	F32DE8A0A	11/30/1999	20	21	01/21/2020	-	0		0	0	0	S. Hoffman
										Number of Clients:		
										Number of Households:		
Program: Coordinated Entry Access Point												
Canyon, Bryce	AAFEF1344	09/12/1979	40	41	01/02/2020	-	334		0	0	0	S. Hoffman
										Number of Clients:		
										Number of Households:		
Program: Street Outreach Program												
Bend, Big	FBD52A648	10/07/1976	42	44	12/29/2018	-	703		0	0	0	S. Hoffman
Jonez, Maroon	F3670B32B	01/12/1965	55	55	02/06/2020	-	299		0	0	0	S. Jones*
										Number of Clients:		
										Number of Households:		
Program: Zion Housing												
Mouse, Malia	33347CB86	01/02/2018	1	2	02/01/2019	-	669	undefined	0	0	0	S. Jones*
Mouse, Minnie	471CA3370	01/25/1985	33	35	11/11/2018	-	751	11/11/2018	0	1	0	S. Jones*
Tree, Pine	61F0D4B00	06/04/2011	9	9	06/25/2020	-	159	undefined	0	0	0	S. Hoffman
Canyon, Bryce	AAFEF1344	09/12/1979	41	41	10/08/2020	10/08/2020	0	10/08/2020	1	1	0	G. Demo
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	32	10/26/2020	-	36	10/26/2020	0	0	0	S. Hoffman
										Number of Clients:		
										Number of Households:		
										Total Number of Clients:		
										Total Number of Households:		
denotes Inactive Assigned Staff												
Program Name								Project Type				
Arches Navigation Center								Emergency Shelter				
Coordinated Entry Access Point								Coordinated Entry				
Street Outreach Program								Street Outreach				
Zion Housing								PH - Permanent Supportive Housing (disability required)				

Resources

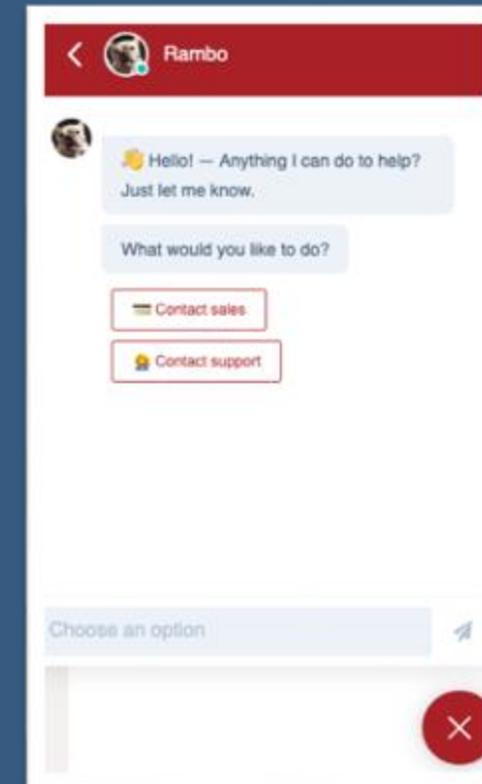
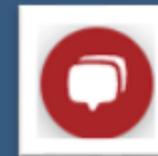
Bitfocus Help Desk

- onesf@bitfocus.com
- 415.429.4211

ONESF Help Center Website:

- onesf.bitfocus.com

Help Desk Widget (In ONE System and on ONESF Help Center Website)



Questions?