

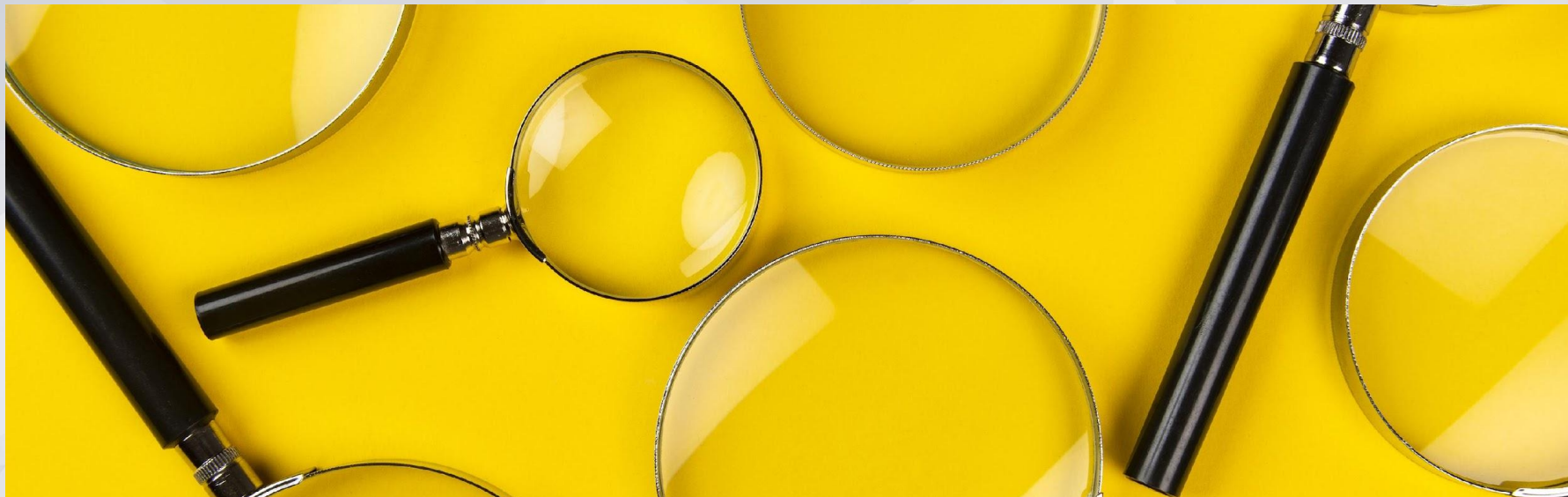
Homeless Prevention Program Training

Objectives

Search and Create Clients in the ONE system

Review Clients History

Document Services



Searching Clients in the ONE System

Creating New Profiles - Searching for Clients in ONE

SEARCH FOR A CLIENT

ADD CLIENT +

Search By Name, Partial Name, DOB, or SSN

SEARCH

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





Creating New Client Profiles

Creating New Profiles

Please make sure to collect as much information as possible



Avoid using:

- Client refused
- Client Doesn't Know
- Data Not Collected
- Approximate or Partial



For existing profiles, confirm that all information is correct.

CREATE A NEW CLIENT

Social Security Number

- -

Quality of SSN

Select



Last Name



First Name

Quality of Name

Select



Quality of DOB

Select



Date of Birth

/ /

Middle Name

None



Gender

Select



Race

Select



Ethnicity

Select



Please fill in Release of Information form

CANCEL


Duplicate Clients

Charlee Test

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

CLIENT PROFILE

Social Security Number	XXX - XX - 9631	
Quality of SSN	Full SSN Reported	▼
Last Name	Test	
First Name	Charlee	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	01/01/1995	Adult. Age: 28
Middle Name		Suffix None ▼
Alias		
What is the client's current gender identity?	Female	▼



UNIQUE IDENTIFIER
6D73A5732

PROGRAM REFERRAL

Client has a pending program referral.

[VIEW DETAILS](#)


Charlee Test

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

Changes successfully saved.

CLIENT PROFILE

Social Security Number	XXX - XX - 9361	
Quality of SSN	Full SSN Reported	▼
Last Name	Test	
First Name	Charlee	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	01/01/1995	Adult. Age: 28
Middle Name		Suffix None ▼
Alias		
What is the client's current gender identity?	Female	▼
What is the appropriate pronoun to use when addressing then client?	She/her	▼



UNIQUE IDENTIFIER
C7E56686E

Contact Bitfocus Help Desk to Merge Profiles

Bitfocus Help Desk: onesf@bitfocus.com

Only include the client's Unique Identifier (UID) when emailing about clients.







Release of Information

Release of Information

When creating a new client profile, ONE will prompt you to have the client sign a Release of Information or give verbal consent.

- The Release of Information entered date should correspond with both the date that the client signed the release and the date you created the client profile.
- In the next slide, we will demonstrate where you can upload the corresponding release of information

The screenshot displays the ONE System interface. At the top, there are icons for a printer, a calendar, and a shield with a checkmark, the latter of which is highlighted with a red box. Below these icons is the 'Household Members' section, which includes a 'Manage' button and a list of members: 'Lunar Test' and 'Mother *'. A 'RELEASE OF INFORMATION' modal is open, showing a table with the following data:

Permission	Yes
Start Date	06/28/2022 
End Date	06/28/2025 
Documentation	Select

Below the table are 'SAVE CHANGES' and 'CANCEL' buttons. To the left of the modal, a client profile is visible with a silhouette and the text 'UNIQUE IDENTIFIER 6D73A5732'. Below the profile is an 'ELECTRONIC SIGNATURE FORM' modal. This form contains the following text:

By completing this form, you are certifying the client:

- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System

Any signed Release of Information forms must be uploaded in client files.

At the bottom of the signature form are 'SAVE' and 'CANCEL' buttons.



Uploading an ROI

- Select the files tab on the client profile to upload an ROI.
- Select the category for Release of Information
- Next, use the “Select File” button to upload the document.
- Once the document has been uploaded, click “Add Record”

Charlee Test

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

UPLOAD A FILE

Category Release of Information

Predefined Name Release of Information: Homeless Response System

File **Select File**

Trouble attaching files? Switch to the Basic Uploader

Private ☐

ADD RECORD CANCEL



Client History

Client History

Client information and history can be found throughout the ONE System.

A client's active referrals can be found under the client's Unique Identifier.


You can also find a client's usage of programs, resources, and services by selecting the "History" tab at the client level.

Charlee Test

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

CLIENT PROFILE

Social Security Number	XXX - XX - 9631	?
Quality of SSN	Full SSN Reported	▼
Last Name	Test	
First Name	Charlee	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	01/01/1995	Adult. Age: 28
Middle Name		Suffix None ▼
Alias		
What is the client's current gender identity?	Female	▼



UNIQUE IDENTIFIER
6D73A5732 ⓘ

PROGRAM REFERRAL
Client has a pending program referral.
[VIEW DETAILS](#)

Client History

When selecting the “History” tab at the client level, the client’s history will show in chronological order of newest to oldest.

The history is color-coded by type which can be referenced at the bottom of the screen on the “History” tab.

You will also notice icons next to certain items.

Problem Solving/Diversion/Rapid Resolution intervention or service:Problem Solvi... [TRAINING] Compass Family Services ⓘ	08/01/2022	08/01/2022		
Compass Family Shelter [TRAINING] Compass Family Services ⓘ	08/01/2022	Active		
National Crown Winton – CoC:National Crown Winton – CoC [TRAINING] Episcopal Community Services ⓘ	07/07/2022	07/07/2022		
Referral: Yellowstone Congregate Shelter Demo Agency referral to Demo Agency ⓘ	06/10/2022	Pending (in process)		
Adult Primary CE Assessment (SF Version) [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ		06/10/2022		
Problem Solving/Diversion/Rapid Resolution intervention or service:Problem Solvi... [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	05/13/2022	05/13/2022		
Problem Solving/Diversion/Rapid Resolution intervention or service:Problem Solvi... [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	05/10/2022	05/10/2022		
ECS: SOMA Access Point [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	05/09/2022	06/10/2022		
Post Hotel - CoC [TRAINING] Episcopal Community Services ⓘ	05/04/2022	Active		
Problem Solving/Diversion/Rapid Resolution intervention or service:Problem Solvi... [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ	05/02/2022	05/02/2022		

« 1 2 3 4 »

Program

Service

Referral

Reservation

Assessment








Events

Client History

Item	Type and Color
Clarity Connect PSH Program System	Program: tan
Case management:Case management System	Service Items: white
VI-SPDAT Prescreen for Single Adults [V2] System	Assessments: green
Reservation: Reservation:Reservation System	Reservations: pink
Referral: Community Queue System referral to Community Queue	Referrals: blue
Referral to a Housing Stability Voucher:Referral to a Housing Stability Voucher Help Center Agency ⓘ	Coordinated Entry Events: peach

Client History

By hovering over each icon, you will be able to view additional information related to the item:

Icon	Description
	Service items with attached expenses
	Services, Assessments, and Reservations linked to an enrollment Coordinated Entry Events (Inferred or Manual)
	A note is associated with the service item or referral.
	The program enrollment was the result of a referral.
	Click this icon to delete the historical item.
	Click this icon to view and edit the details of a historical item.
	Click this icon to view (but not edit) the details of a historical item.

Client History

You can also customize your search by using the different fields under the History tab.

Charlee Test

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

HISTORY

Advanced search options Hide ^

Search		Category	Any category	Agency	[TRAINING] Young Community Develop
Start Date	01/09/2023	End Date	01/09/2023	Type	Services
Coordinated Entry	<input type="checkbox"/>	Clear <input type="button" value="SEARCH"/>			



Client Files

UPLOADING CLIENT FILES AND DOCUMENTS

From the client profile:

- Files
- Select 'Add File' OR
- Select 'Add Form'



No results found

Uploading Files and Documents

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

UPLOAD A FILE

Category

Finances and Income

Predefined Name

Lease

File

Select File

Trouble attaching files? Switch to the Basic Uploader

Private

☐

ADD RECORD

FILE TYPE CATEGORIES

- ✓ Background Check
- CalWORKs HSP Documents
- CES
- Family, Social and Legal
- Finances and Income
- Health and Medical
- Homelessness Prevention Assistance Providers
- Housing Ladder Application
- HPRP Documentation
- Permanent Housing Application Forms and Documentation
- Personal Identification
- Release of Information

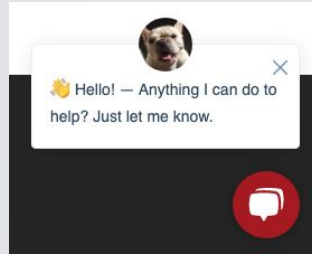
ONE System Support:

ONE System Support Site:
onesf.bitfocus.com

Bitfocus Help Desk:
onesf@bitfocus.com

Ph: 415.429-4211

Chat Icon:



Community Administration
onesf-admin@bitfocus.com

And for specific help go to: [The Prevention Pages within SF ONE Help](#)

