

# Prevention Programs

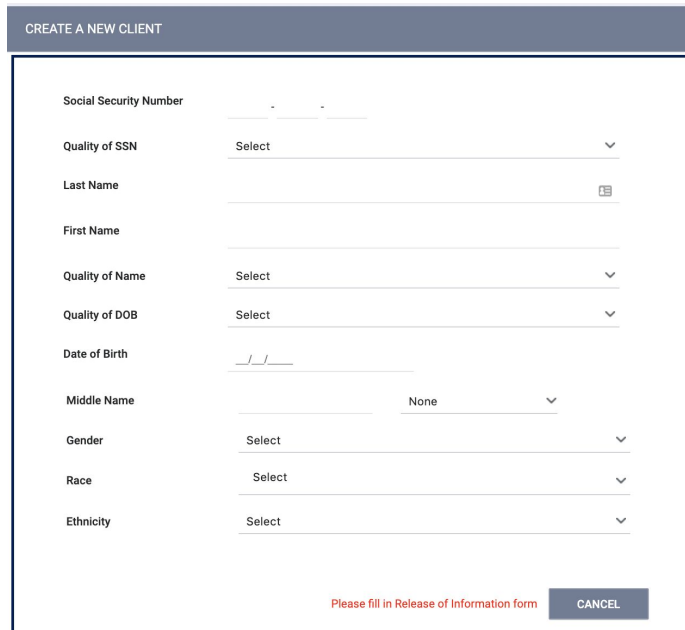
## Instructions for Enrolling a Client and Recording Services

This guide provides step by step instructions on enrolling a client in a prevention program and recording prevention services in the ONE System.

### **Step 1: Search for/Create a Client Profile**



- Search for client/ head of household
- Search by name, DOB and SSN
- If unable to find head of household, create a new profile

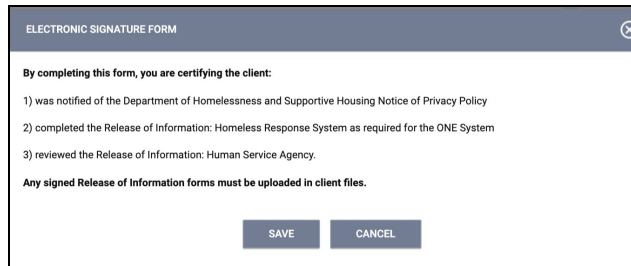
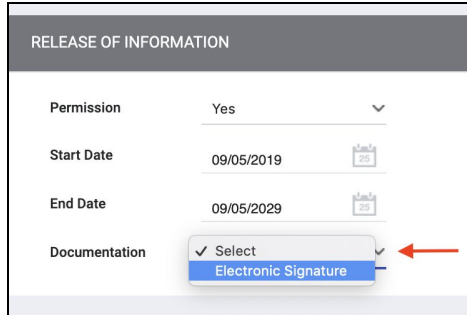


When creating a new client profile, ONE will prompt you to have the client sign a Release of Information.

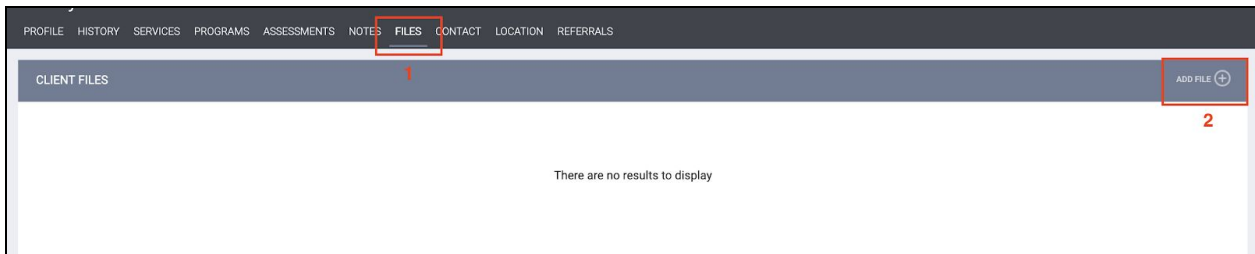
## Prevention Programs

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- The Release of information enter date, should correspond with both the date that the client signed the release and the date you created the client profile.
- The release of information appears to the right of the Client Profile screen.



- Click save and then upload a scanned copy of the signed release of information in client files.
- To upload client files, select the files tab
- You will then be prompted by the Upload a File screen where you can maneuver through file uploads



# Prevention Programs

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Mary Secondclient

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

**UPLOAD A FILE**

Category: Release of Information Select Release of Information

Predefined Name: Release of Information: Homeless R... Select Release of Information: Homeless Response System

File: Select File Click Select File and choose the signed Release of information file from your computer to upload

Trouble attaching files? Switch to the Basic Uploader

Private:

Click Save Changes

SAVE CHANGES CANCEL


### **Step 2: Enroll a Client in the Program**

- Enrollments indicate that a client is being served by a particular program
- Data from enrollments are also used to compile reports for funders
- On the client’s profile screen, click Programs. You will see a list of the programs available at your agency. Click on the down caret next to the program you want for the client. Information about the program will display. Click Enroll.

Mary Secondclient

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

**PROGRAM HISTORY**



No results found

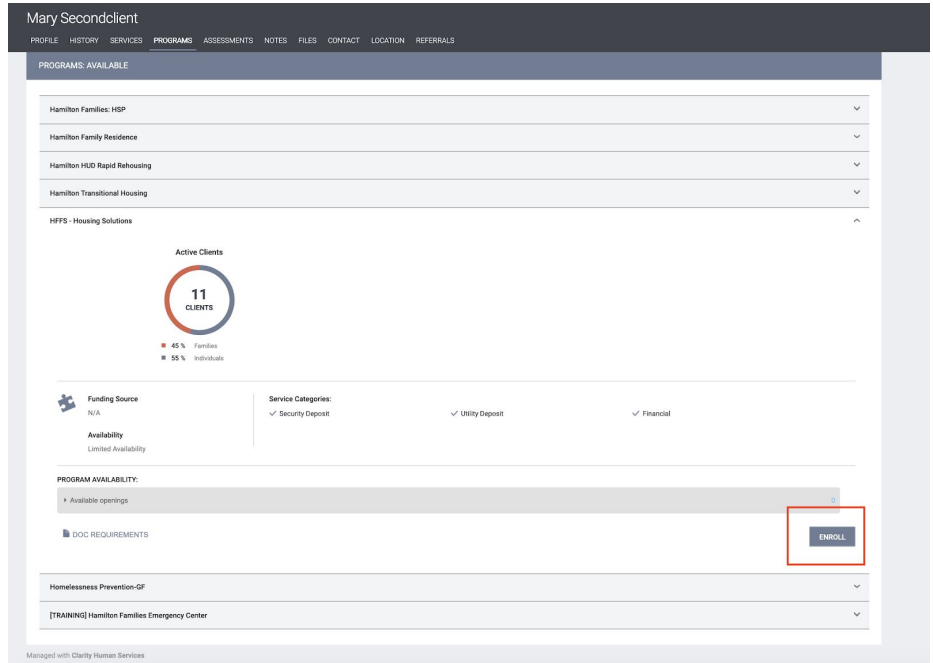
**PROGRAMS: AVAILABLE**

Hamilton Families: HSP	▼
Hamilton Family Residence	▼
Hamilton HUD Rapid Rehousing	▼
Hamilton Transitional Housing	▼
HPFS - Housing Solutions	<span style="border: 1px solid red; padding: 2px;">▼</span>
Homelessness Prevention-GF	▼
[TRAINING] Hamilton Families Emergency Center	▼

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

PROGRAMS AVAILABLE

- Hamilton Families: HSP
- Hamilton Family Residence
- Hamilton HUD Rapid Rehousing
- Hamilton Transitional Housing
- HFFS - Housing Solutions

Active Clients

11 CLIENTS

- 45 % Families
- 55 % Individuals

Funding Source: N/A

Service Categories:
 

- ✓ Security Deposit
- ✓ Utility Deposit
- ✓ Financial

Availability: Limited Availability

PROGRAM AVAILABILITY:

- Available openings

DOC REQUIREMENTS

Homelessness Prevention-GF

[TRAINING] Hamilton Families Emergency Center

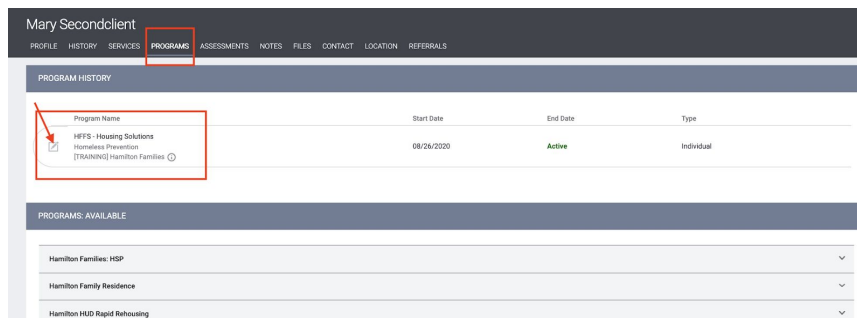
Managed with Clarity Human Services

- When doing enrollments, please make sure to collect as much information as possible
- Please avoid using “Client refused” or Data Not Collected” whenever possible
- Complete all information on the enrollment screen and click save.

\*Full instructions on how to complete a program enrollment can be found [here](#).

### Step 3: Record Services

- To return to the program record for the client later, click on the programs tab from the client’s profile screen. Then find the program enrollment and click on the edit icon that appears when you hover over the program name.



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

PROGRAM HISTORY

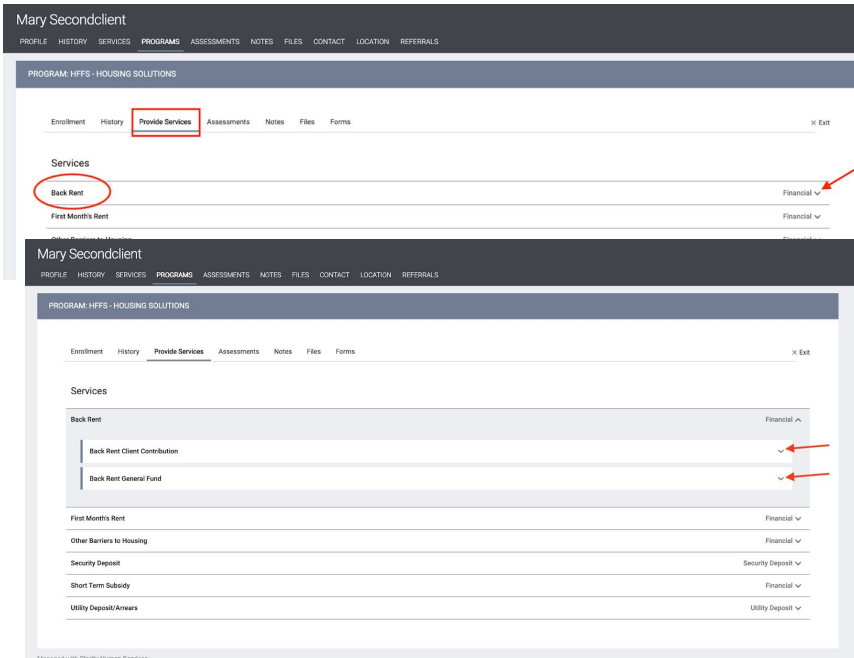
Program Name	Start Date	End Date	Type
<input checked="" type="checkbox"/> HFFS - Housing Solutions Homeless Prevention [TRAINING] Hamilton Families	08/26/2020	Active	Individual

PROGRAMS AVAILABLE

- Hamilton Families: HSP
- Hamilton Family Residence
- Hamilton HUD Rapid Rehousing

## Prevention Programs

### Instructions for Enrolling a Client and Recording Services



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

PROGRAM: HFFS - HOUSING SOLUTIONS

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

Services

Back Rent Financial ↓

First Month's Rent Financial ↓

Mary Secondclient

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

PROGRAM: HFFS - HOUSING SOLUTIONS

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

Services

Back Rent Financial ↑

Back Rent Client Contribution ↓

Back Rent General Fund ↓

First Month's Rent Financial ↓

Other Barriers to Housing Financial ↓

Security Deposit Security Deposit ↓

Short Term Subsidy Financial ↓

Utility Deposit/Amears Utility Deposit ↓

In the program record, click on Provide Services. Then find the service you want to record in the list and click on the down to the right of the service name. This will open a list of service items.

There should be two service items for each prevention service. You will record both of these service items one at a time by clicking on the down caret and completing the service item form that displays.

For each service item (Client Contribution and General

Fund Expense), be sure to update all three dates to the accurate dates of service provision and expenditure. Enter the expense amount and select the appropriate fund source. Enter a note with any necessary information for the record. **Please note: for short term subsidies service should be entered once and then date and amount should be updated for subsequent months.**

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PROGRAM: HFFS - HOUSING SOLUTIONS

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

Services

Back Rent Financial ^

**Back Rent Client Contribution**

Start Date: 08/27/2020  End Date: 08/27/2020

Expense Amount: 500.00  Expense Date: 08/27/2020

Funding Source: Client Contribution

Service Note

**B**

This is the amount we agreed the client could pay and still be able to make next month's rent.

**SUBMIT**

Back Rent General Fund

Back Rent Financial ^

Back Rent Client Contribution

**Back Rent General Fund**

Start Date: 08/27/2020  End Date: 08/27/2020

Expense Amount: 1500.00  Expense Date: 08/27/2020

Funding Source: General Fund

Service Note

**B**

The amount needed to bring the rent up to date.

**SUBMIT**

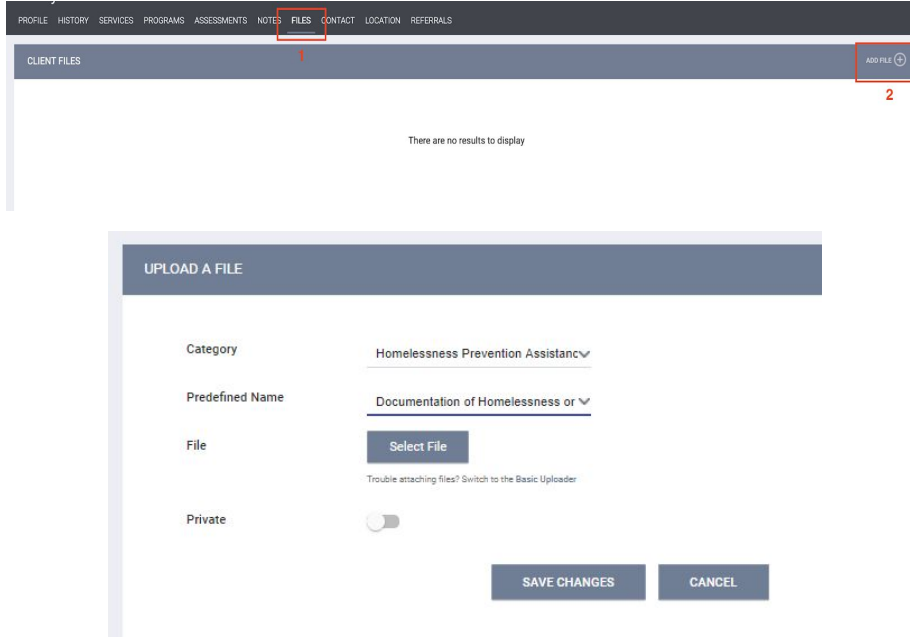
Be sure to provide a service at least once every 90 days or exit the client if services are complete. Clients who have no service entered for 90 days will be auto-exited on the last day a service was provided. A list of clients who haven't had a service in 80 days will be emailed to staff.

### **Step 4: Uploading Files**

- To upload client files, select the files tab
- Select Homelessness Prevention Assistance Providers under File category.

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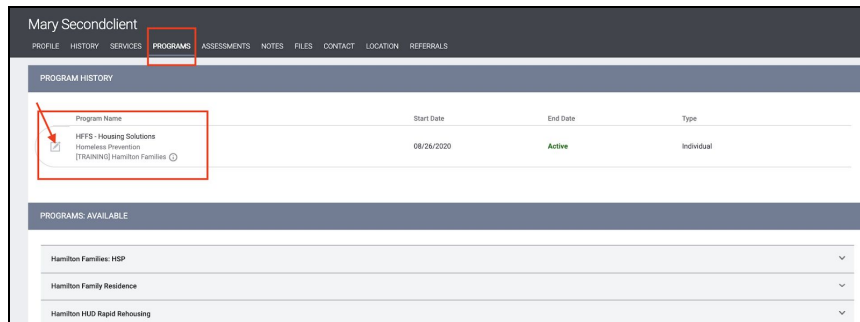
The screenshot shows the 'CLIENT FILES' section of the Bitfocus interface. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'FILES' tab is highlighted with a red box and a red '1'. Below the navigation bar, the 'CLIENT FILES' section is shown with a red box and a red '2' around the 'ADD FILE' button. The main content area displays 'There are no results to display'. Below this, an 'UPLOAD A FILE' modal is open, showing the following fields:

- Category: Homelessness Prevention Assistance
- Predefined Name: Documentation of Homelessness or
- File: Select File (button)
- Private:

Buttons for 'SAVE CHANGES' and 'CANCEL' are at the bottom of the modal.

### **Step 5: Exit the client from the program**

To exit the client, return to the program enrollment record and click Exit on the far right side of the program enrollment tabs bar.



The screenshot shows the 'PROGRAMS' section of the Bitfocus interface for a client named 'Mary Secondclient'. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'PROGRAMS' tab is highlighted with a red box. Below the navigation bar, the 'PROGRAM HISTORY' section is shown with a table of program enrollment records. A red box and a red arrow point to the 'Exit' button in the first row of the table.

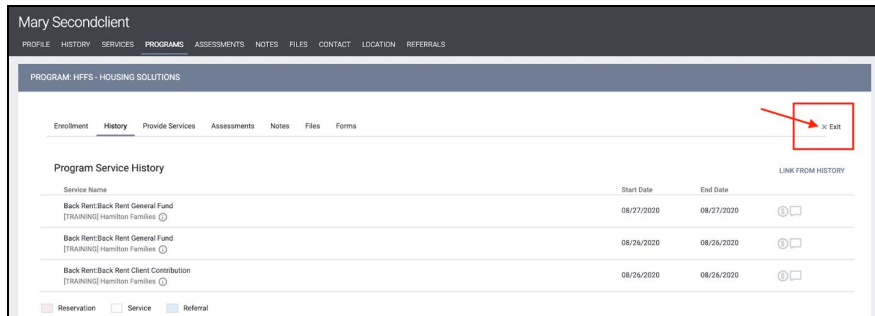
Program Name	Start Date	End Date	Type
<input checked="" type="checkbox"/> HFS - Housing Solutions Homeless Prevention [TRAINING] Hamilton Families	08/26/2020	Active	Individual

Below the table, the 'PROGRAMS AVAILABLE' section is shown with a list of programs:

- Hamilton Families: HSP
- Hamilton Family Residence
- Hamilton HUD Rapid Rehousing

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Good news about exits is that a lot of your information will cascade forward, but pay close attention to what new information you will need to accurately record. Make sure the exit date and all other information on the screen is complete and correct.

- Be sure to include the Exit Destination Address, Destination, Housing Status at Exit and Subsidy Information
- Update Disability, Income, Benefits and Insurance information
- Please avoid using "Client refused" or "Data Not Collected" whenever possible



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## Instructions for Enrolling a Client and Recording Services


Mary Secondclient

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


PROGRAM: HFFS - HOUSING SOLUTIONS

Enrollment History Provide Services Assessments Notes Files Forms

End Program for client Mary Secondclient

Project Exit Date 08/27/2020 

Exit Reason Program Completed

Exit Destination: Address 123 24th st 

Exit Destination: City San Francisco

Exit Destination: Zipcode 94105

Destination Rental by client, no ongoing housing subsidy

Housing Status at Exit Able to maintain the housing they had at project entry

Subsidy Information Only with financial assistance other than a subsidy

DISABLING CONDITIONS AND BARRIERS

Physical Disability No

Developmental Disability No

Chronic Health Condition No

HIV - AIDS No

Mental Health Problem No

Substance Abuse Problem No

MONTHLY INCOME AND SOURCES

Income from Any Source Yes

Earned Income  Amount 1900

Unemployment Insurance

Full instructions on how to complete a program exit can be found [here](#).