



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

OVT & ONE Vacancy Training

December 7, 2022



Agenda

- Overview – Purpose (10 min)
- Review of OVT and ONE process for vacancies (10 min)
- Process for entering vacant units (non-batch referrals) (20 min)
 - Vacant units that will be offline for 15+ days
 - Vacant units that are ready for referral
- Data Entry Expectations (5 min)
- Q&A (15 min)
- Part 2: Batching (only for providers participating in batch referrals) (15 min)



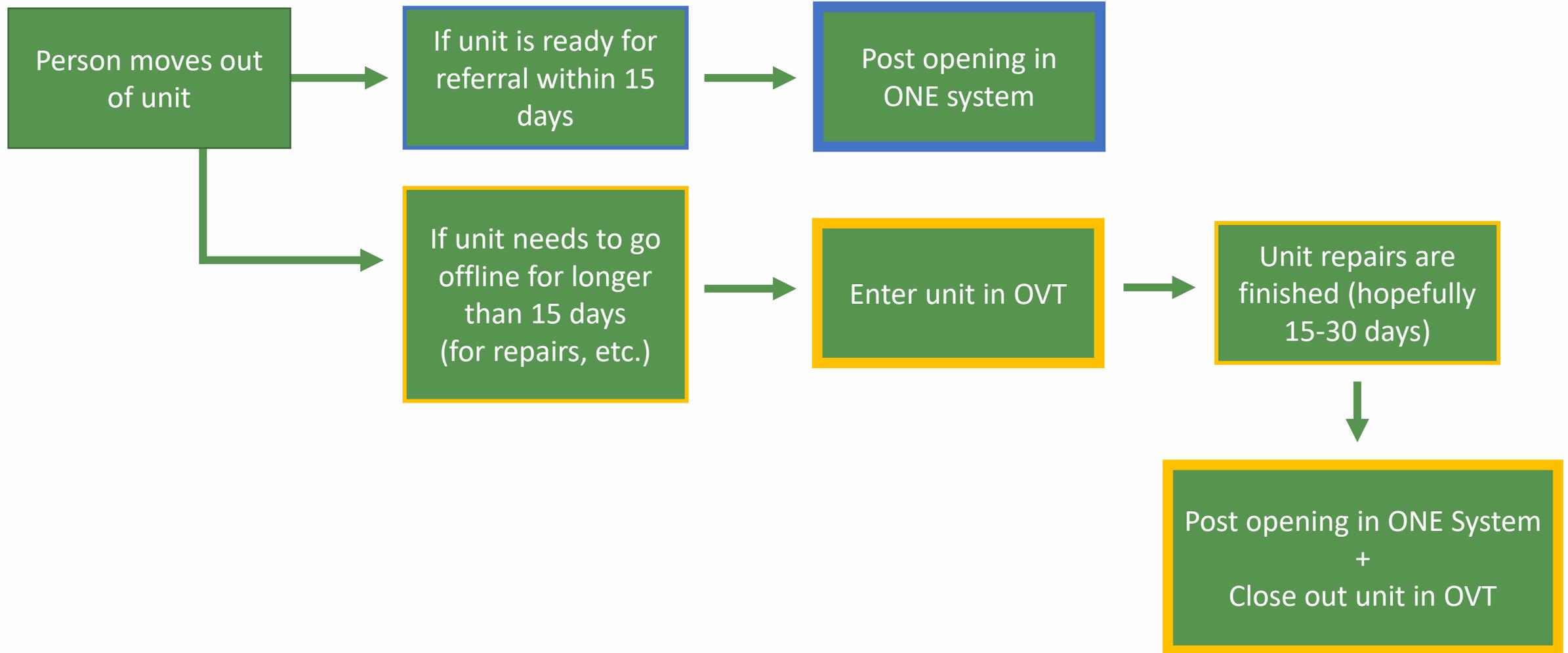
DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Part 1: Vacancy Tracking

Vacancy Tracking: ONE & OVT

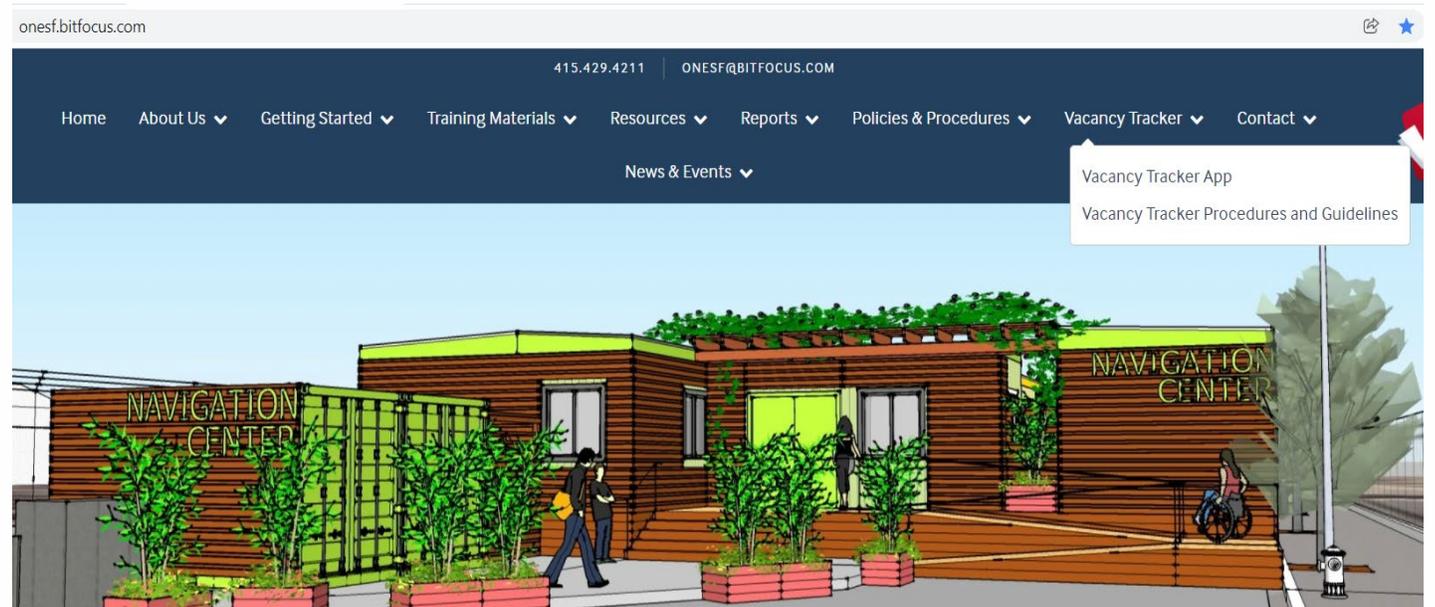
	ONE – Online Navigation & Entry	OVT – Offline Vacancy Tracker
Purpose	HMIS system of record to track clients across all HSH service areas; also used to track and match vacancies that are “ready for referral”	To track offline units (units that will not be ready for a referral for ~15 days or longer)
Developer	Bitfocus	HSH IT Team
Access	Multiple users per agency with different access roles	Generally one user designated per agency or portfolio
Used by	Property management and support services staff	Property management staff
How units are listed	Programs are listed by funding/subsidy type under service provider agency	Housing sites are listed under property management agency
Links	ONE System	Offline Vacancy Tracker

OVT and ONE Process for Vacancies (1:1 Referrals)



OVT: Accessing the OVT

On your web browser, go to:
<https://onesf.bitfocus.com/> and click
on the “Vacancy Tracker App” link.
Do not attempt to log into ONE.



OVT: Entering Units into the OVT

Upon logging in you will see units associated with your property. To add a new unit to the tracker, select “New” on the right side of the tracker.

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. At the top, it shows the 'Department of Homelessness and Supportive Housing (HSH)' logo and the title 'City Wide Offline Vacancy Tracker'. A search bar contains 'hotel california'. Below the search bar, a table lists one unit: 'Hotel California' with 'Unit# 123' and 'Property Hold'. On the right side, there is a 'New' button with a green arrow pointing to it. The main content area displays a personalized message: 'Hello Valerie Okelola, Please use the New button to report a new vacant unit. Or Pick an unit on the vacant list to Edit/Update the unit.' The bottom status bar indicates '1 Vacant Unit(s) Found' and the date '3/31/2022'.

OVT: Entering Units into the OVT – Unit Number

Use the Program name dropdown to select the correct program.

Enter information for all the fields in the form. The first of which is the unit number.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123
Property Hold

Update an existing unit

Program name Hotel California
1360 Mission

Unit number 123

Status

Move out reason Voluntary Surrender-Other

Date of vacancy 3/28/2022

Expected date available 4/4/2022

Notes

Unit size 1BD

New
Clone
Delete
Update
Cancel

OVT: Entering Units into the OVT - Status

Enter the status of the unit using the Status drop down menu.

Please note, **Hold for Transfer** is used for internal transfers - property holds unit for an internal transfer at the site while **HSH Hold for Transfer**, is meant for external transfers (HSH holds a unit for a RA transfer, Life Safety transfer, etc.)

Information about OVT status options are available in the OVT Procedures and Guidelines document [here](#).

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

Hotel California

100 (TEST) Hotel California 4 days vacant 1BD CNC... Adult,VET.	Unit# 123 >
100 (TEST) Hotel California 4 days vacant 1BD CNC... Adult,VET.	Unit# 124 >

Report a new vacant unit

Program name: Hotel California
Unit number: 125
Status: [Dropdown menu open]
Move out reason: [Dropdown menu open]
Date of vacancy: [Text field]
Expected date available: [Text field]
Notes: [Text area]
Unit size: [Text field]

Save
Cancel

2 Vacant Unit(s) Found 4/1/2022

OVT: Entering Units into the OVT – Move out reason and Date of Vacancy

Select the reason why the unit is now vacant from the move out reason dropdown menu.

Enter the date the unit became vacant as well. This field is used in HSH dashboards for tracking and reporting purposes.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET.

Report a new vacant unit - CLONE

Program name: Hotel California
1360 Mission

Unit number:

Status:

Move out reason: Voluntary Surrender-Other

Date of vacancy: 3/28/2022

Expected date available:

Notes:

Unit size: 1BD

1 Vacant Unit(s) Found 4/1/2022

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

Save
Cancel

OVT: Entering Units into the OVT – Expected Date of Vacancy

Enter the expected date that the unit will be available. This date helps the transfer team prepare to get a client referred to the unit once it is available.

Update this date if the expected date available changes.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET,

Update an existing unit

Program name: Hotel California
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Notes: [Text Area]
Unit size: 1BD

Buttons: New, Clone, Delete, Update, Cancel

1 Vacant Unit(s) Found 4/1/2022
Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 11:41:57 AM

OVT: Entering Units into the OVT – Notes

Use the notes field to provide additional relevant information the unit such and any additional eligibility requirements for the unit.

Use the notes filled to provide context regarding delays in getting the unit online and ready for a client.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET

Update an existing unit

Program name: Hotel California
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Notes: [Text Area]
Unit size: 1BD

1 Vacant Unit(s) Found 4/1/2022
Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 11:41:57 AM

OVT: Entering Units into the OVT – Unit Size and Occupancy

Select unit size from the dropdown menu

Enter the minimum and maximum occupancy for the unit

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. On the left, a list of units for 'Hotel California' is shown, with two units selected: Unit # 123 and Unit # 124. The right panel, titled 'Report a new vacant unit', contains the following fields:

- Notes: A text area for entering notes.
- Unit size: A dropdown menu currently set to '1BD'.
- Minimum occupancy: A text input field containing '1'.
- Maximum occupancy: A text input field containing '2'.
- Amenities: A dropdown menu with 'Bathroom', 'Elevator', and 'Roll-in Shower' selected.
- Populations: A dropdown menu with 'Adult' and 'VET' selected.
- Subsidy funding source: A dropdown menu with 'CNC', 'GF', and 'HCV VA' selected.
- Minimum income: A text input field containing '0'.
- Maximum income: A text input field containing '20000'.

At the bottom of the interface, it indicates '2 Vacant Unit(s) Found' as of '4/1/2022'. On the far right, there are 'Save' and 'Cancel' buttons.

OVT: Entering Units into the OVT – Minimum and Maximum Income

Enter income information associated with the unit

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. On the left, a list of units for 'Hotel California' is shown, including unit numbers 123 and 124. The right side features a 'Report a new vacant unit' form with the following fields:

- Notes: A large text area for entering notes.
- Unit size: A dropdown menu set to '1BD'.
- Minimum occupancy: A text input field containing '1'.
- Maximum occupancy: A text input field containing '2'.
- Amenities: A dropdown menu with 'Bathroom', 'Elevator', and 'Roll-in Shower' selected.
- Populations: A dropdown menu with 'Adult' and 'VET' selected.
- Subsidy funding source: A dropdown menu with 'CNC', 'GF', and 'HCV VA' selected.
- Minimum income: A text input field containing '0'.
- Maximum income: A text input field containing '20000'.

At the bottom of the interface, it indicates '2 Vacant Unit(s) Found' and the date '4/1/2022'. On the right side, there are 'Save' and 'Cancel' buttons.

OVT: Saving and Cloning a Vacant Unit

Saving and Cloning a Vacant Unit

To avoid reentering the same information for each vacant unit, clone the unit and update cloned units with the appropriate unit information (e.g., unit number, unit size, date of vacancy, expected date available).

After entering information for a unit select update to save changes. Thereafter, select the clone button on the right-hand side of the tracker form.

Upon selecting the clone button, a new form will appear where you can enter and edit information for other vacant units.

Department of Homelessness and Supportive Housing (HSH) City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET,

Update an existing unit

Program name: Hotel California (1360 Mission)
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other (Dropdown)

New
Clone
Delete

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

Department of Homelessness and Supportive Housing (HSH) City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET,

Report a new vacant unit - CLONE

Program name: Hotel California (1360 Mission)
Unit number: [Empty field]
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other (Dropdown)
Date of vacancy: 3/28/2022

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

OVT: Updating Status to Ready for Referral

Update the status of a vacancy when:

- Ready for Referral: (Unit is available for occupancy)

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface for the Department of Homelessness and Supportive Housing (HSH). The interface is divided into two main sections: a list of vacancies on the left and a detailed update form on the right.

Left Panel: Vacancy List

Program name	Unit#	Status
Hotel California	123	4 days vacant
Hotel California	124	Ready for Batch ...
Hotel California	125	31 days vacant

Right Panel: Update an existing unit

Program name: Hotel California (1360 Mission)
Unit number: 123
Status: Ready for Referral
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Date posted to ONE: [Empty field]
ONE posting ID: [Empty field]
Notes: [Empty text area]

Navigation Buttons: New, Clone, Delete, Update, Cancel

Footer: 3 Vacant Unit(s) Found 4/1/2022 Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 5:07:00 PM

OVT: Updating Status to Ready for Referral

- When an offline unit becomes Ready for Referral you must do both of the following:
 1. **Post the unit to ONE**
 2. **“Close out” the OVT entry**
- Both of these steps are necessary so the vacant unit is listed in either ONE or OVT
 - If a single unit is listed in both systems it is double-counted

ONE: Posting Available Unit

🔑 Navigate to:

- ONE
- Agency
- Referrals
- Availability
- Permanent Housing/ RRH Queue
- Program

The screenshot displays the HSH system interface. At the top, the header reads "Department of Homelessness and Supportive Housing". The user profile "Lehua Asher" is visible in the top right corner. The navigation menu includes "SEARCH", "CASELOAD", and "REFERRALS". The main content area is titled "REFERRALS" and features a breadcrumb trail: "Dashboard > Pending > Community Queue > Analysis > Completed > Denied > Sent > Availability > Open Units". The "Availability" tab is highlighted. Below the breadcrumb trail, the "Program Availability" section shows a horizontal carousel of program categories: "Pandemic Prioritization Queue (HSH Staff Only)", "Permanent Housing/ RRH Queue" (highlighted with a red box), "SFHA - EHV", and "Stabilization Rooms Queue (SFHOT Management Only)". Below this, a table lists programs with their availability status:

Program	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Bayview Flexible Housing Subsidy Pool- Prop C			
Camelot Hotel - GF			
Empress - CoC			

The "Empress - CoC" row is highlighted with a red box. To the right of the main content, there is a donut chart showing the distribution of referrals: "Pending" (1) and "Completed" (1). A legend below the chart identifies the colors: dark purple for "Pending" and medium purple for "Completed".

ONE: Posting Available Unit

Empress - CoC

FULL AVAILABILITY **LIMITED AVAILABILITY** NO AVAILABILITY ^

There are no available openings

There are no reserved openings

+ ADD SINGLE OPENING + ADD MULTIPLE OPENINGS

- Make sure program is set to Limited Availability
- Click “+” to add a single opening or multiple openings

ONE: Post Available Unit

- Enter actual/expected date unit will be available
- Add as many details as possible
 - Fields outlined in red are required
- Important: you must also add the unit number to the Additional Notes field

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?

Does the building have a nurse?

Shared Bathroom

Does the unit have a shower?

Does the unit have a toilet?

Sub-Population: Veteran

Sub-Population: Adult

Sub-Population: Youth

Sub-Population: Family

HDAP

HAT Referral

MHSA

Access Point Staff Responsible for Filling

SAVE CHANGES **CANCEL**

Select at least 1 Sub-Population
You may select more than 1 if applicable

OVT: Closing Out When Unit Posted to ONE

• If the unit you just posted to ONE had been listed in the OVT:

- Change the Status to “Ready for Referral” & complete the two additional fields that appear:

1. Date posted to ONE

Enter the date the unit was posted to ONE

2. ONE posting ID

To simplify the workflow, this is no longer required, instead, please enter the name of the person that posted the unit to ONE in this field (this field name will be updated)

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface for the Department of Homelessness and Supportive Housing (HSH). The main form is titled 'Update an existing unit' and is for the unit 'Hotel California'. The form fields are as follows:

Field	Value
Program name	Hotel California
Unit number	100
Status	Ready for Referral
Move out reason	Voluntary Surrender-Other
Date of vacancy	2/23/2022
Expected date available	4/29/2022
Date posted to ONE	[Empty field]
ONE posting ID	[Empty field]
Notes	[Empty field]

Red boxes highlight the 'Status' dropdown menu (set to 'Ready for Referral') and the 'Date posted to ONE' and 'ONE posting ID' input fields. The 'Update' button is also highlighted. On the left, a list of units for 'Hotel California' is visible, including units 100, 100B, 123, 124, and 126.

OVT: Viewing Processed/Removed Units

- The unit you just closed out (Hotel California Unit #100) will no longer appear on the vacant unit list in OVT
- The unit still resides in the OVT however
- Click “Units Processed/Removed from Tracker” (upper right corner of screen)

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

Units Processed/Removed from Tracker

Search Results
100 (TEST) Hotel California 39 days vacant 1BD CNC... Adult,VET, Unit# 123 32 days past due
100 (TEST) Hotel California 39 days vacant 1BD CNC... Adult,VET, Unit# 124 28 days past due Ready for Batch ...
100 (TEST) Hotel California 39 days vacant 1BD CNC... Adult,VET, Unit# 126 Ready for Batch ...
100 (TEST) Hotel California 1BD GF, Adult,Sr. 5... Unit# 127 Maintenance

Update an existing unit

Program name: Hotel California
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Notes: [Text Area]
Unit size: 1BD

Buttons: New, Clone, Delete, Update, Cancel

OVT: Viewing Processed/Removed Units

Processed Units - Posted To ONE and Transfer Completed Units
 City Wide Offline Vacancy Tracker

Back

Property: 100 (TEST) | Hotel California | Search:

Property	Unit	Processed	Status	Date Post to ...	ONE Post ...	Transfer C...	Deleted	Move-In ...	Withdrawal ...
Hotel California	1	Yes	HSH-Hold for Tr...			8/26/2020			
Hotel California	1	Yes	Batch Move-In					4/13/2021	
Hotel California	100	Yes	Ready for Referral	4/22/2022	1234				
Hotel California	101	Yes	Batch Withdrawn						4/20/2021
Hotel California	101	Yes	Batch Move-In					6/24/2021	
Hotel California	102	Yes	Ready for Batch ...				4/29/2021		
Hotel California	102	Yes	Ready for Referral	9/2/2021					
Hotel California	103	Yes	Ready for Batch ...				4/29/2021		
Hotel California	103	Yes	Batch Withdrawn						6/24/2021
Hotel California	103	Yes	Ready for Referral	12/3/2021	7069				
Hotel California	104	Yes	Ready for Batch ...				4/29/2021		
Hotel California	105	Yes	Ready for Referral	3/24/2022	6789				
Hotel California	124	Yes	Ready for Referral					3/31/2022	
Hotel California	124	Yes	Ready for Referral					3/31/2022	

ONE: Accept Referral – Property Management

- Change referral status to “Pending in Process”
 - Within 2 days of receipt of referral
- Make sure the correct staff are set to receive referral notifications
- Please see slides 16 – 23 of the Housing Training for step-by-step instructions

The screenshot displays the 'REFERRALS' application interface. At the top, there is a navigation bar with 'REFERRALS' and a sub-menu with options: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. Below this is the 'REFERRAL: EDIT' form. The form contains the following fields and values:

Client	Jane Doe
Referred Program	Baldwin - CoC
Referred to Agency	[TRAINING] Tenderloin Housing Clinic
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	08/30/2021 11:47 AM
Days Pending	219 day(s)
In Process	0 day(s)
Qualified	No
Referred by Staff	Swati Pande ⓘ
Case Manager	Select ▼
Last Activity	11/25/2021 <input type="button" value="CHECK-IN"/>
Status	Pending ▼
Private	

The 'Status' dropdown menu is open, showing the following options: Pending, Pending - In Process (highlighted), Denied, and Expired. At the bottom right of the form, there are two buttons: 'SAVE CHANGES' and 'CANCEL'.

ONE: Close Referral/Enroll Client – Support Services

- Enroll client in program
 - Within 3 working days of move-in
- Please see slides 24 – 28 of the Housing Training for step-by-step instructions
 - Enrollment should be linked to a referral
 - The Program/Enrollment Date & Housing Move-In Date are the same date for site-based PSH
 - The Program/Enrollment Date defaults to the current date
 - Please take care to change the Program/Enrollment Date to match the Housing Move-In Date
 - Please make sure Prior Living Situation – Type of Residence is accurate

Data Entry Expectations

- Vacant units should be posted as soon as the unit becomes vacant and at least on a weekly basis.
- The Offline Vacancy Tracker and ONE System must be updated with current vacancies no later than 5pm on Friday
- Issues with posting on time should be communicated with your HSH program manager immediately.

OVT: Ready for Referral Timeline for Vacancy Status

Offline Vacancy Tracker Status	Maximum Length of Time Offline	Additional Information
Janitorial	7 days	
Maintenance	14 - 30 days	Minor Maintenance -14 days; Major- 30 Days
HSH-Hold for Transfer Hold for Transfer Property Hold Ready for Inspection	14 days	Notify HSH Program Manager of Delays/Concerns
Pest Control	14 - 21 days	
Excessive Property Medical Examiner Hold Temp Occupied	30 days	Notify HSH Program Manager if Time Offline Will Exceed 30 Days
Delayed (Explain)	Varies	Notify HSH Program Manager with Detailed Explanation

Workflow Summary - 1:1 Referrals

How Do I?	ONE or OVT?	More Information
Post “Ready for Referral” Unit	ONE	See slides 18 – 20 of this presentation
Post “Offline” Unit	OVT	See slides 7 – 15 of this presentation
Accept a Referral	ONE	See slide 24 of this presentation See slides 16 – 23 of Housing Training
Update Status When “Offline” Unit becomes “Ready for Referral”	ONE&OVT	See slides 16 – 23 of this presentation
Record Move-In	ONE	See slides 24 – 28 of Housing Training (services staff)

Resources

• Offline Vacancy Tracker

• OVT Guidelines

• ONE System

• Bitfocus SF homepage

• Set up ONE account:

- New user completes 3 trainings: BF General Training, SF DPH Privacy Training, and Housing Training
- Agency lead requests new account from the Bitfocus Helpdesk onesf@bitfocus.com
- Complete instructions to set up new users are here: <https://onesf.bitfocus.com/new-user-info>
- Agency lead can also request ONE users are set up to receive referral notifications

• Housing Training Slides

• Bitfocus Help, Training or Technical Assistance

- Schedule TA call with Bitfocus Community Administration team: <https://meetings.hubspot.com/regina-abadajos/reginaholly>
- Bitfocus holds virtual office hours on the 4th Tuesday of every month from 2 - 3pm
- Help Desk - 5 a.m. to 5 p.m. PST, Monday through Friday and can be reached several ways: onesf@bitfocus.com, 415-429-4211, click the "Help" button to chat on the OneSF support site



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Questions Part 1





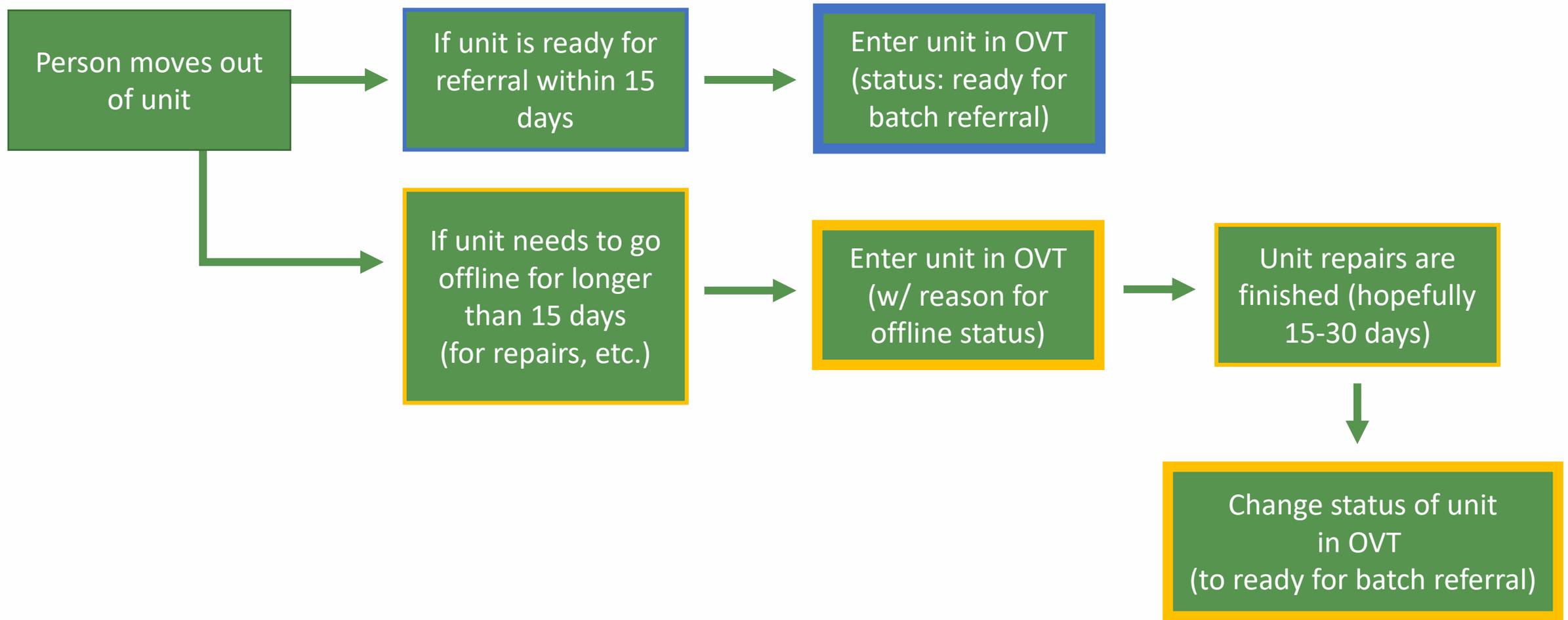
DEPARTMENT OF
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SUPPORTIVE HOUSING

Part 2: Vacancy Tracking Batch Referrals

Vacancy Tracking: ONE & OVT (Batch Referrals)

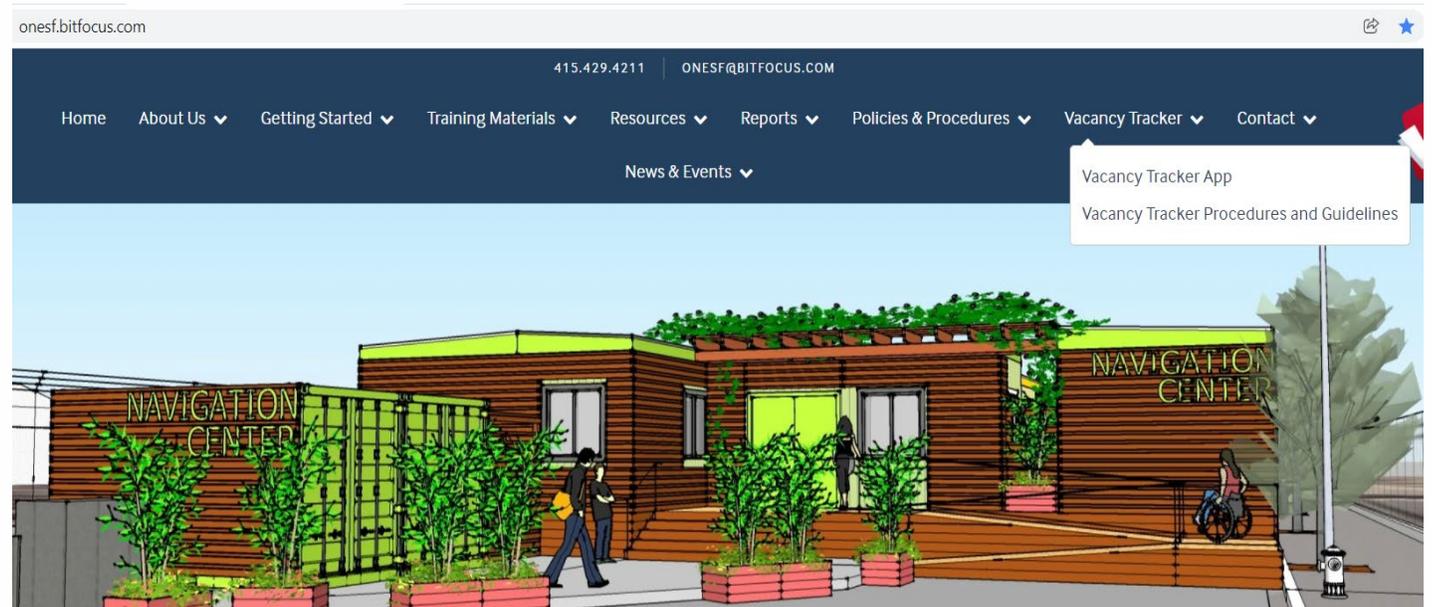
	ONE – Online Navigation & Entry	OVT – Offline Vacancy Tracker
Purpose	HMIS system of record to track clients across all HSH service areas; also used to track housing program referrals	To track units that are used for batch referrals and offline units (units that will not be ready for a referral for ~15 days or longer)
Developer	Bitfocus	HSH IT Team
Access	Multiple users per agency with different access roles	Generally one user designated per agency or portfolio
Used by	Property management and support services staff	Property management staff
How units are listed	Programs are listed by funding/subsidy type under service provider agency	Housing sites are listed under property management agency
Links	ONE System	Offline Vacancy Tracker

OVT process for vacancies (Batch Referrals)



OVT: Accessing the OVT

On your web browser, go to:
<https://onesf.bitfocus.com/> and click
on the “Vacancy Tracker App” link.
Do not attempt to log into ONE.



OVT: Entering Units into the OVT

Upon logging in you will see units associated with your property. To add a new unit to the tracker, select “New” on the right side of the tracker.

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. The header includes the Department of Homelessness and Supportive Housing (HSH) logo and the title 'City Wide Offline Vacancy Tracker'. The search bar contains 'hotel california'. Below the search bar, a table lists one unit: 'Hotel California' with 'Unit# 123' and 'Property Hold'. On the right side, there is a 'New' button with a green arrow pointing up. The main content area shows a personalized greeting: 'Hello Valerie Okelola, Please use the New button to report a new vacant unit. Or Pick an unit on the vacant list to Edit/Update the unit.' The footer indicates '1 Vacant Unit(s) Found' and the date '3/31/2022'.

OVT: Entering Units into the OVT – Unit Number

Use the Program name dropdown to select the correct program.

Enter information for all the fields in the form. The first of which is the unit number.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

hotel california

100 (TEST)
Hotel California Unit# 123
Property Hold

Update an existing unit

Program name: Hotel California
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Notes: [Text Area]
Unit size: 1BD

New
Clone
Delete
Update
Cancel

OVT: Entering Units into the OVT - Status

When entering a new vacant unit into the OVT, select 'Ready for Batch – No Referral' from the Status dropdown.

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface for the Department of Homelessness and Supportive Housing (HSH). The interface includes a search bar with 'hotel california' entered, a list of results for 'Hotel California' with unit number 123, and a 'Report a new vacant unit' form. The form fields include Program name (Hotel California), Unit number (124), Status (Ready for Batch - No Referral), Move out reason (Pest Control), Date of vacancy, Expected date available, Notes, and Unit size. The status dropdown menu is open, showing options: Pest Control, Property Hold, Ready for Inspection, Ready for Referral, Temp Occupied, Ready for Batch - No Referral, Ready for Batch - Pending Referral, Batch Move-In, and Batch Withdrawn. The 'Ready for Batch - No Referral' option is selected. The interface also features a 'Save' button and a 'Cancel' button.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

100 (TEST)
Hotel California Unit# 123
Property Hold

Report a new vacant unit

Program name: Hotel California
Unit number: 124
Status: Ready for Batch - No Referral
Move out reason: Pest Control
Date of vacancy:
Expected date available:
Notes:
Unit size:

1 Vacant Unit(s) Found 3/31/2022

OVT: Entering Units into the OVT – Move out reason and Date of Vacancy

Select the reason why the unit is now vacant from the move out reason dropdown menu.

Enter the date the unit became vacant as well. This field is used in HSH dashboards for tracking and reporting purposes.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET.

Report a new vacant unit - CLONE

Program name: Hotel California
Unit number:
Status:
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available:
Notes:
Unit size: 1BD

1 Vacant Unit(s) Found 4/1/2022

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

Save
Cancel

OVT: Entering Units into the OVT – Expected Date of Vacancy

Enter the expected date that the unit will be available. This date helps the transfer team prepare to get a client referred to the unit once it is available.

Update this date if the expected date available changes.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

hotel california

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET,

Update an existing unit

Program name: Hotel California
Unit number: 123
Status: [Dropdown]
Move out reason: Voluntary Surrender-Other
Date of vacancy: 3/28/2022
Expected date available: 4/4/2022
Notes: [Text Area]
Unit size: 1BD

Buttons: New, Clone, Delete, Update, Cancel

1 Vacant Unit(s) Found 4/1/2022
Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 11:41:57 AM

OVT: Entering Units into the OVT – Notes

Use the notes field to provide additional relevant information the unit such and any additional eligibility requirements for the unit.

Use the notes filled to provide context regarding delays in getting the unit online and ready for a client.

Department of Homelessness and Supportive Housing (HSH)
City Wide Offline Vacancy Tracker

100 (TEST)
Hotel California Unit# 123 >
4 days vacant 1BD CNC... Adult,VET

Update an existing unit

Program name: Hotel California
1360 Mission

Unit number: 123

Status: [Dropdown]

Move out reason: Voluntary Surrender-Other

Date of vacancy: 3/28/2022

Expected date available: 4/4/2022

Notes: [Text Area]

Unit size: 1BD

1 Vacant Unit(s) Found 4/1/2022

Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 11:41:57 AM

OVT Provider Dashboard
OVT Provider Batch Referrals Dashboard
Units Processed/Removed from Tracker

New
Clone
Delete
Update
Cancel

OVT: Entering Units into the OVT – Unit Size and Occupancy

Select unit size from the dropdown menu

Enter the minimum and maximum occupancy for the unit

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. On the left, a list of units for 'Hotel California' is shown, with two units selected: Unit # 123 and Unit # 124. The right side features a 'Report a new vacant unit' form with the following fields: Notes (text area), Unit size (dropdown menu set to '1BD'), Minimum occupancy (text input '1'), Maximum occupancy (text input '2'), Amenities (checkboxes for Bathroom, Elevator, Roll-in Shower), Populations (checkboxes for Adult, VET), Subsidy funding source (checkboxes for CNC, GF, HCV VA), Minimum income (text input '0'), and Maximum income (text input '20000'). A 'Save' button and a 'Cancel' button are located at the bottom right. The bottom status bar indicates '2 Vacant Unit(s) Found' as of '4/1/2022'.

Unit#	Unit Size	Occupancy	Amenities	Populations	Subsidy Funding Source	Min Income	Max Income
123	1BD	1	Bathroom, Elevator, Roll-in Shower	Adult, VET	CNC, GF, HCV VA	0	20000
124	1BD	2	Bathroom, Elevator, Roll-in Shower	Adult, VET	CNC, GF, HCV VA	0	20000

OVT: Entering Units into the OVT – Minimum and Maximum Income

Enter income information associated with the unit

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. On the left, a list of units for 'Hotel California' is shown, including unit numbers 123 and 124. The right side features a 'Report a new vacant unit' form with the following fields:

- Notes: A large text area for entering notes.
- Unit size: A dropdown menu set to '1BD'.
- Minimum occupancy: A text input field containing '1'.
- Maximum occupancy: A text input field containing '2'.
- Amenities: A dropdown menu with 'Bathroom', 'Elevator', and 'Roll-in Shower' selected.
- Populations: A dropdown menu with 'Adult' and 'VET' selected.
- Subsidy funding source: A dropdown menu with 'CNC', 'GF', and 'HCV VA' selected.
- Minimum income: A text input field containing '0'.
- Maximum income: A text input field containing '20000'.

At the bottom of the interface, it indicates '2 Vacant Unit(s) Found' and the date '4/1/2022'. On the right side, there are 'Save' and 'Cancel' buttons.

OVT: Saving and Cloning a Vacant Unit

Saving and Cloning a Vacant Unit

To avoid reentering the same information for each vacant unit, clone the unit and update cloned units with the appropriate unit information (e.g., unit number, unit size, date of vacancy, expected date available).

After entering information for a unit select update to save changes. Thereafter, select the clone button on the right-hand side of the tracker form.

Upon selecting the clone button, a new form will appear where you can enter and edit information for other vacant units.

The screenshot shows the 'City Wide Offline Vacancy Tracker' interface. The header includes the Department of Homelessness and Supportive Housing (HSH) logo and navigation links for 'OVT Provider Dashboard', 'OVT Provider Batch Referrals Dashboard', and 'Units Processed/Removed from Tracker'. The search bar contains 'hotel california'. Below the search bar, a unit card for 'Hotel California' (Unit# 123) is displayed with details: '100 (TEST)', '4 days vacant', '1BD', and 'CNC... Adult,VET'. The main form area is titled 'Update an existing unit' and contains the following fields: 'Program name' (Hotel California), 'Unit number' (123), 'Status' (dropdown), and 'Move out reason' (Voluntary Surrender-Other). On the right side, there are three buttons: 'New', 'Clone', and 'Delete'.

The screenshot shows the 'City Wide Offline Vacancy Tracker' interface. The header is identical to the previous screenshot. The search bar contains 'hotel california'. Below the search bar, the same unit card for 'Hotel California' (Unit# 123) is displayed. The main form area is titled 'Report a new vacant unit - CLONE' and contains the following fields: 'Program name' (Hotel California), 'Unit number' (empty), 'Status' (dropdown), 'Move out reason' (Voluntary Surrender-Other), and 'Date of vacancy' (3/28/2022). On the right side, there are three buttons: 'New', 'Clone', and 'Delete'.

OVT: Updating Status for Batch Referrals

Update the status of a vacancy when:

- Client accepts a unit – 'Ready for Batch – Pending Referral'
- Client moves in - 'Batch Move-In'
- Client refuses, is denied, or otherwise withdrawn from unit - 'Batch Withdrawn'

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface. At the top, it identifies the 'Department of Homelessness and Supportive Housing (HSH)'. The main header is 'City Wide Offline Vacancy Tracker'. On the right, there are links for 'OVT Provider Dashboard', 'OVT Provider Batch Referrals Dashboard', and 'Units Processed/Removed from Tracker'. The search bar contains 'hotel california'. Below it, a unit entry shows '100 (TEST) Hotel California' with 'Unit# 123' and 'Property Hold'. The main form area is titled 'Report a new vacant unit' and includes fields for 'Program name' (Hotel California), 'Unit number' (124), 'Status' (Temp Occupied), 'Move out reason' (Property Hold), 'Date of vacancy', 'Expected date available', 'Notes', and 'Unit size'. A 'Save' button and a 'Cancel' button are visible on the right side of the form. At the bottom, it indicates '1 Vacant Unit(s) Found' as of '3/31/2022'.

OVT: Updating Status for Batch Referrals

When updating the status to 'Ready for Batch – Pending Referral', 'Batch Move-In' or 'Batch Withdrawn', additional form fields will appear in the tracker.

- Ready for Batch – Pending Referral will require a ONE client ID and Date of Referral.
- Batch Move-In will require ONE client ID a move-in date.
- Batch Withdrawn will require withdrawal date.
 - After withdrawing a unit, it will then move to the units processed/removed tracker and will need to be reposted as a 'Ready for Batch – No Referral' unit in the OVT.

The screenshot displays the 'City Wide Offline Vacancy Tracker' interface for the Department of Homelessness and Supportive Housing (HSH). The interface is divided into two main sections: a unit list on the left and a detailed update form on the right.

Unit List (Left):

Program name	Unit#	Status
Hotel California	123	4 days vacant
Hotel California	124	Ready for Batch...
Hotel California	125	31 days vacant

Update Form (Right):

Update an existing unit

Program name: Hotel California (1360 Mission)

Unit number: 125

Status: Batch Move-In

Move out reason: Voluntary Surrender-Other

Date of vacancy: 3/1/2022

Expected date available: 5/2/2022

ONE client ID: [Empty field]

Referred date: [Empty field]

Move-in date: [Empty field]

Buttons: New, Clone, Delete, Update, Cancel

Footer: 3 Vacant Unit(s) Found 4/1/2022 Last update: Okelola, Valerie (HOM) - Friday, April 1, 2022 5:07:00 PM

OVT: Viewing Processed/Removed Units

After updating the status of a unit to Batch Move-In or Batch Withdrawn, the unit will no longer appear on the vacant unit list. To view these units, select the 'Units Processed/Removed from Tracker' link on the upper right-hand side of the form.

Processed Units - Posted To ONE and Transfer Completed Units

City Wide Offline Vacancy Tracker

Property: 100 (TEST) | Hotel California

Property	v Unit	Processed	Status	Date Post to ...	ONE Post ...	Transfer C...	Deleted	Move-In ...	Withdrawal ...
Hotel California	5	Yes	Batch Withdrawn						4/16/2021
Hotel California	4	Yes	Batch Withdrawn						4/16/2021
Hotel California	3	Yes	Batch Withdrawn						4/14/2021
Hotel California	2	Yes	Batch Withdrawn						4/20/2021
Hotel California	125	Yes	Ready for Referral	9/9/2021	213				
Hotel California	125	Yes	Batch Withdrawn						4/4/2022
Hotel California	124	Yes	Ready for Referral				3/31/2022		
Hotel California	124	Yes	Ready for Referral				3/31/2022		
Hotel California	105	Yes	Ready for Referral	3/24/2022	6789				
Hotel California	104	Yes	Ready for Batch ...				4/29/2021		
Hotel California	103	Yes	Ready for Batch ...				4/29/2021		
Hotel California	103	Yes	Batch Withdrawn						6/24/2021
Hotel California	103	Yes	Ready for Referral	12/3/2021	7069				
Hotel California	102	Yes	Ready for Batch ...				4/29/2021		

ONE: Accept Referral – Property Management

- Change referral status to “Pending in Process”
 - Within 2 days of receipt of referral
- Make sure the correct staff are set to receive referral notifications
- Please see slides 16 – 23 of the Housing Training for step-by-step instructions

The screenshot displays the 'REFERRALS' application interface. At the top, there is a navigation bar with 'REFERRALS' and a sub-menu with options: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. Below this is the 'REFERRAL: EDIT' form. The form contains the following fields and values:

Client	Jane Doe
Referred Program	Baldwin - CoC
Referred to Agency	[TRAINING] Tenderloin Housing Clinic
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	08/30/2021 11:47 AM
Days Pending	219 day(s)
In Process	0 day(s)
Qualified	No
Referred by Staff	Swati Pande ⓘ
Case Manager	Select ▼
Last Activity	11/25/2021 <input type="button" value="CHECK-IN"/>
Status	Pending ▼
Private	

The 'Status' dropdown menu is open, showing the following options: Pending, Pending - In Process (highlighted), Denied, and Expired. At the bottom right of the form, there are two buttons: 'SAVE CHANGES' and 'CANCEL'.

ONE: Close Referral/Enroll Client – Support Services

- Enroll client in program
 - Within 3 working days of move-in
- Please see slides 24 – 28 of the Housing Training for step-by-step instructions
 - Enrollment should be linked to a referral
 - The Program/Enrollment Date & Housing Move-In Date are the same date for site-based PSH
 - The Program/Enrollment Date defaults to the current date
 - Please take care to change the Program/Enrollment Date to match the Housing Move-In Date
 - Please make sure Prior Living Situation – Type of Residence is accurate
 - If the client is moving directly from a SIP site, then Prior Living Situation – Type of Residence: Emergency shelter, including hotel or motel paid with emergency shelter voucher, or RHY-funded Host Home shelter

Data Entry Expectations

- Vacant units should be posted as soon as the unit becomes vacant and at least on a weekly basis.
- The Offline Vacancy Tracker and ONE System must be updated with current vacancies no later than 5pm on Friday
- Issues with posting on time should be communicated with your HSH program manager immediately.

OVT: Ready for Referral Timeline for Vacancy Status

Offline Vacancy Tracker Status	Maximum Length of Time Offline	Additional Information
Janitorial	7 days	
Maintenance	14 - 30 days	Minor Maintenance -14 days; Major- 30 Days
HSH-Hold for Transfer Hold for Transfer Property Hold Ready for Inspection	14 days	Notify HSH Program Manager of Delays/Concerns
Pest Control	14 - 21 days	
Excessive Property Medical Examiner Hold Temp Occupied	30 days	Notify HSH Program Manager if Time Offline Will Exceed 30 Days
Delayed (Explain)	Varies	Notify HSH Program Manager with Detailed Explanation

Workflow Summary - Batch & 1:1 Referrals

How Do I?	Your Site Is:		More Information
	Batching	1:1 Referring	
Post "Ready for Referral" Unit		ONE	See slides 18 – 20 of this presentation
	OVT		See slides 35 – 44 of this presentation
Post "Offline" Unit	OVT	OVT	See slides 7 – 15 of this presentation
Accept a Referral	ONE	ONE	See slide 24 of this presentation See slides 16 – 23 of Housing Training
Update Status When "Offline" Unit becomes "Ready for Referral"		ONE&OVT	See slides 16 – 23 of this presentation
	OVT		See slide 45 of this presentation - change status to "Ready for Batch – No Referral"
Record Move-In	ONE	ONE	See slides 24 – 28 of Housing Training (services staff)
	OVT		See slide 45 of this presentation - (1) change status to "Batch Move-In", (2) enter ONE client ID (3) enter Move-in date (4) click Update

Resources

• Offline Vacancy Tracker

• OVT Guidelines

• ONE System

• Bitfocus SF homepage

• Set up ONE account:

- New user completes 3 trainings: BF General Training, SF DPH Privacy Training, and Housing Training
- Agency lead requests new account from the Bitfocus Helpdesk onesf@bitfocus.com
- Complete instructions to set up new users are here: <https://onesf.bitfocus.com/new-user-info>
- Agency lead can also request ONE users are set up to receive referral notifications

• Housing Training Slides

• Bitfocus Help, Training or Technical Assistance

- Schedule TA call with Bitfocus Community Administration team: <https://meetings.hubspot.com/regina-abadajos/reginaholly>
- Bitfocus holds virtual office hours on the 4th Tuesday of every month from 2 - 3pm
- Help Desk - 5 a.m. to 5 p.m. PST, Monday through Friday and can be reached several ways: onesf@bitfocus.com, 415-429-4211, click the "Help" button to chat on the OneSF support site



DEPARTMENT OF
HOMELESSNESS AND
SUPPORTIVE HOUSING

Thank you

