ONE System Housing Toolkit

Site-Based Permanent Supportive Housing

Updated March 2025

This toolkit contains tipsheets designed to help you complete your necessary work in the ONE System. You can select individual topics using the table of contents below.

There are additional resources available to you on the ONE System Help Site and the Bitfocus Clarity Human Services Help Center. This toolkit focuses on the PSH workflow and is not exhaustive, so we encourage you to use these sites for important information on topics like Homelessness Response System privacy practices and user access.

If you or your supervisor have questions or concerns that are not addressed in this toolkit or either of the linked help sites, please contact the ONE System support team by email at onesf@bitfocus.com or your HSH Program Manager.

Contents

What am I responsible for?

Below are some key ONE System functions, broken out by Support Services and Property Management responsibilities. This is not an exhaustive list, and the division of duties at your site or program might vary from the list below. However, unless you've been instructed otherwise, most programs divide responsibilities in ONE as follows:

Support Services

- Enter program enrollments and ensure correct unit assignment *at move-in*
- Annual assessments
- Exits
- Tracking eviction notices and unlawful detainers served
- Ensuring program rosters are up to date and include all clients in your program(s)

Property Management

- Making units offline and ending offline status when unit becomes available
- Ensuring clients are correctly associated with their current unit
- Regularly monitor your building rosters to ensure accurate occupancy and availability

Be sure to reach out to your supervisor or HSH Program Manager if you have any questions or concerns.

A Note about Inventory

The Inventory functionality in ONE allows for information about specific housing units to be stored in the ONE System. This allows clients to be assigned to a specific unit, unit history to be tracked, and units to be marked offline as needed. Inventory helps to improve efficiency, system-wide visibility, and streamlines the placement of clients into the units that best fit their needs. Inventory functionality was launched in ONE in 2023 and was a major change to the way programs were managed in the system. Because of this, it’s important to understand what inventory is and isn’t.

Inventory in ONE is:

- A set of tools built into the ONE System
- A way to more precisely track and view the current status of each unit
- Information that will help better match clients to the units that fit their needs

Inventory is not:

- A separate platform
- A property management system
- A complete overhaul of the ONE System
- A new approach to the Homelessness Response System or Coordinated Entry

Using Inventory in ONE helps with the following:

- Streamlines workflows and better serves clients
- Removes the need to use the Offline Vacancy Tracker (OVT)
- Provides better and more timely information to HSH and the community about which units are unoccupied, for how long, and why
- Supports reconciliation and communication by being a reliable source of truth
- Provides more transparency into the overall housing portfolio

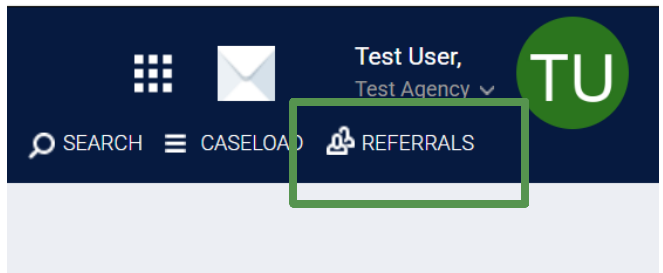
Keeping Inventory up to date requires property management, support services and coordinated entry to update records in ONE in a timely manner. When a client moves out of a unit, it isn’t available for property management to update until the services provider completes the program exit. When an offline status is not ended, the unit is not available for coordinated entry to make a referral.

Managing and Changing the Status of Referrals

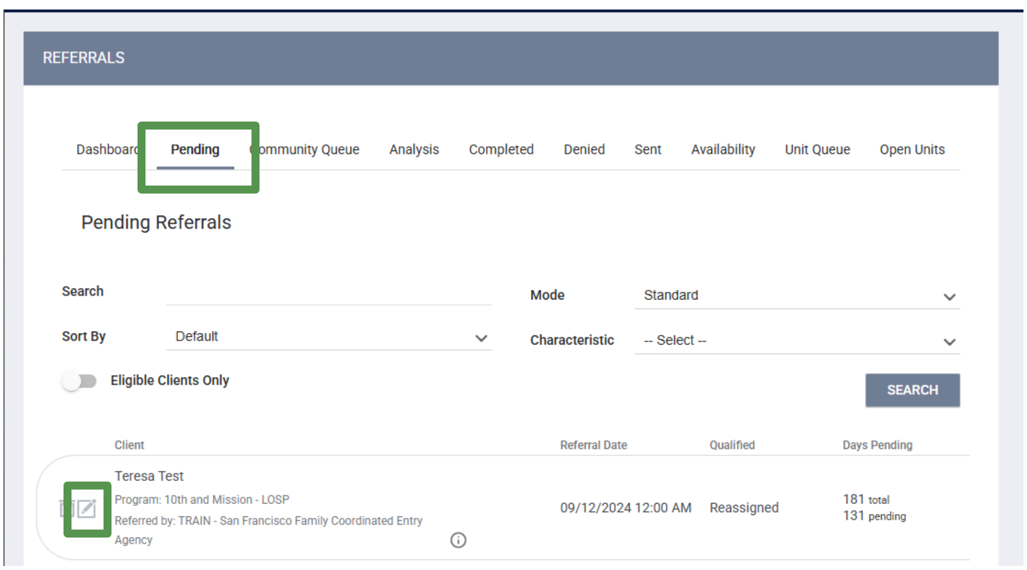
This task is usually completed by ***property managers.***

When a referral is made to your program, you must change its status to Pending – In Progress to acknowledge that you have received the referral and it is in process. This “accepts” the referral, ensures it does not expire, and holds the associated unit for the referred client.

1. Click “Referrals” at the top right corner of the screen (under your name and agency). If you do not see the Referrals link, click “Search” to return to the home screen where it should appear.

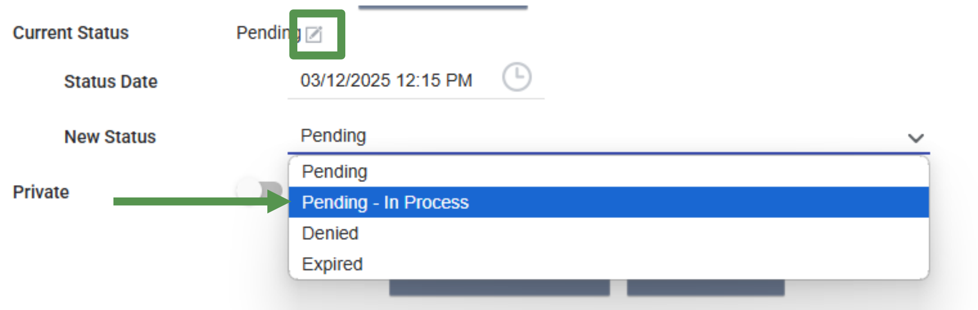


2. Click the “Pending” tab. This will show you a list of clients who have been referred to your agency, but have not yet been enrolled into a program. You can search for the name or UID or order the list of clients by client name or program name.



3. Open the referral you’d like to view by clicking the edit button to the left of the client’s name.

4. Scroll down the Edit Referral screen to **Status** and click the drop-down menu. Change the status to **Pending – In Process**. Then click "Save Changes."



5. Check the **Referred Unit** number. If it is not correct, communicate with the staff member who made the referral so they can deny the referral and make a new referral to the correct unit. See the **Referred by Staff** field if you do not know who made the referral.
6. After saving and confirming, click on the Pending tab to return to the list of pending referrals. The referral will now appear highlighted in green and the status will be updated.

<u>If you need to deny a referral</u>:

Follow the instructions above, but for step 4, select **Denied** as the status. Once Denied is selected, four additional fields will appear that need to be filled out. Complete as follows:

Send to Community Queue	If the client is still experiencing homelessness and is housing referral status, select "Yes" to send the client back to the queue.
Denied by Type	Select provider or client
Denied Reason	Select a reason from the drop-down list
Denied Message	Add notes to explain why the referral was denied. Please be specific to help with future referrals.

Once you Save Changes the unit will automatically revert to available status.

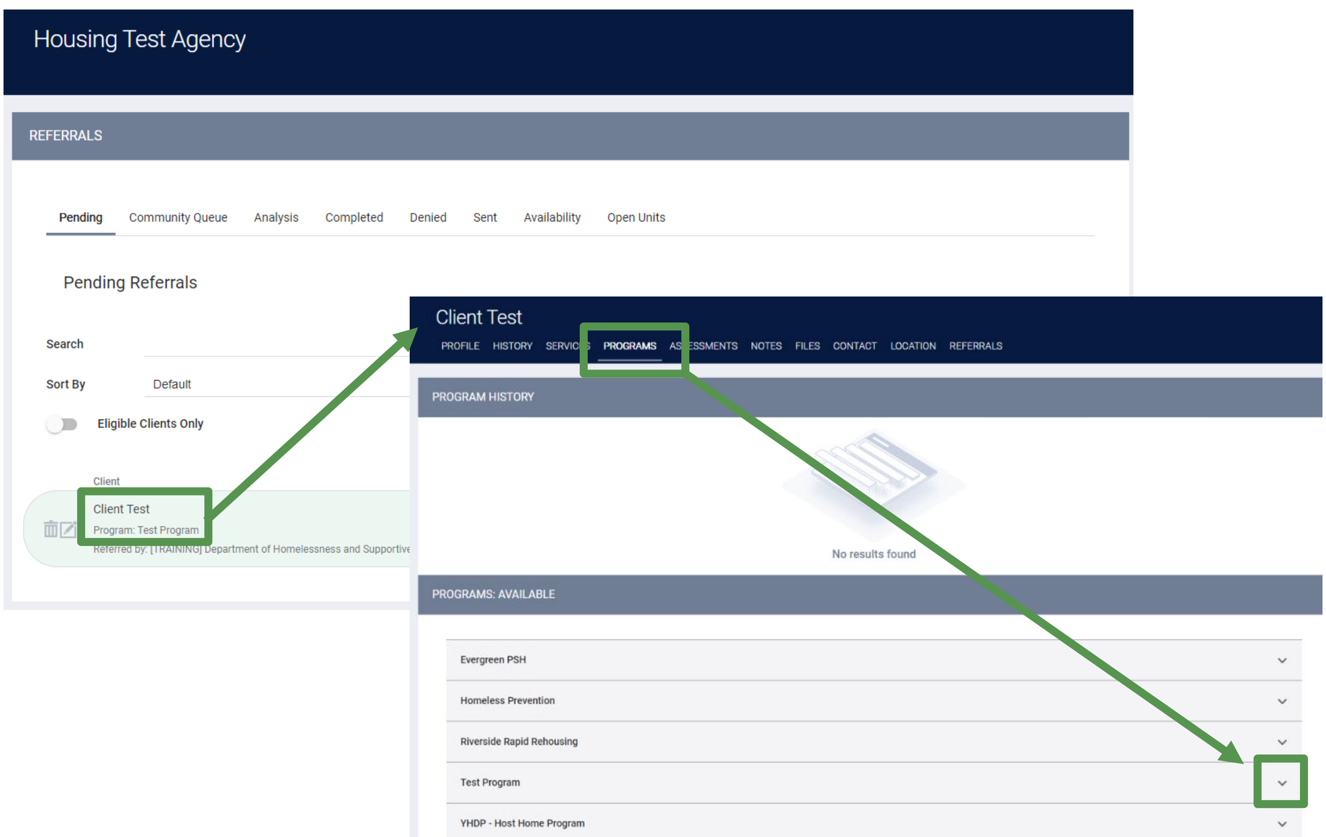
Accept and Enroll Client in Program

This task is usually completed by ***service providers***.

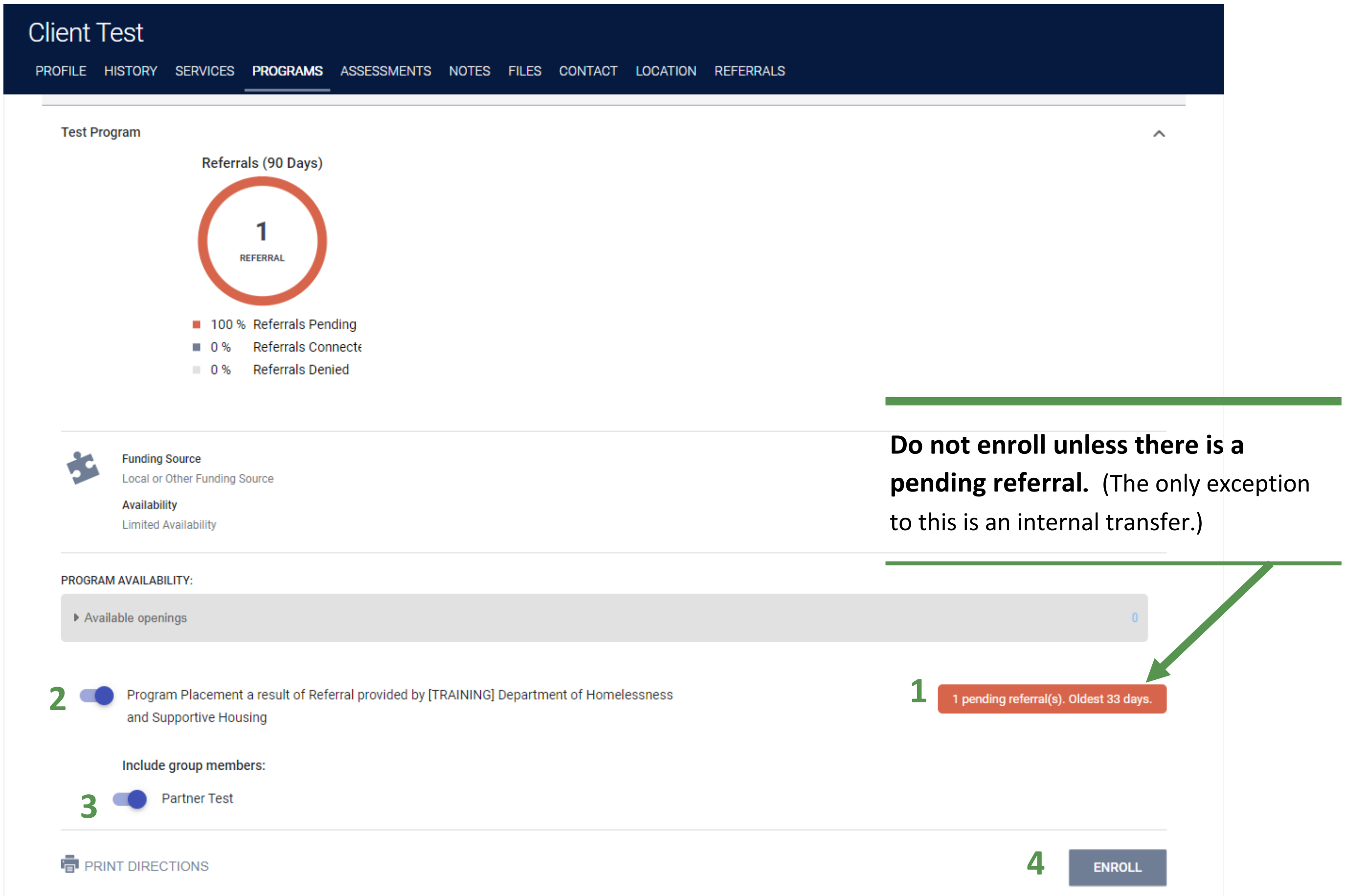
Enroll a client within three business days of move-in.

Pay attention to following appropriate steps for households.

1. Ensure you are in the correct agency in ONE.
2. Open the client profile and click into programs. Under **Programs: Available**, click on the appropriate program to expand. You can also access the client record by clicking on the client's name from the **Pending** tab in **Referrals**.



3. There should be an orange box [1] identifying that there is a pending referral to this program. Ensure the toggle that says 'Program Placement is a result of Referral' [2] is ON and the unit number is correct. If either are incorrect, please contact the Coordinated Entry team before you enroll the client to ensure proper unit assignment and referral.



4. Include any other household members who are moving in by toggling their names ON [3]. Doing so is essential to ensuring that the household is enrolled correctly.

5. Complete the enrollment for the client or household by selecting the **Enroll** button [4]. Doing so will accept and close the referral and link it to the enrollment record.

6. Complete the enrollment, answering all questions. For a household with multiple individuals, the enrollment screen will appear for each household member. Be sure to complete the **Relationship to Head of Household** question.

7. Update the **Program Date** to reflect the date the household moved in. Note: the Program Date defaults to the date you are completing the enrollment, and will almost always need to be changed.

8. Be sure to complete the **Housing Move-In Date** for the head of household on the **Enrollment** tab. The Housing Move-In Date cannot be earlier than the Program Date in the enrollment and is almost always the same as Program Date for site-based PSH. Pay special attention to the **Prior Living Situation** fields as these key fields are used for program and systemwide reporting.

9. Ensure the **Unit Number** and the unit start date are correct. If the unit number needs to be updated, follow the instructions for Transferring a Client to a New Unit which appear later in this Toolkit.

Note: **The Program Date, Housing Move-In Date and Unit Start Date should all be the same date.**

Entering Exits and Exit Reasons for Housing Programs

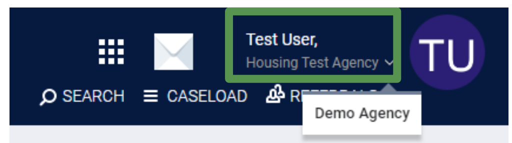
This task is usually completed by ***service providers***.

Update ONE within three business days of a client exit.

Pay attention to following appropriate steps for households.

Exiting a client from the program also exits a client from their assigned unit. It is critical to exit clients from the program and their units so that property management can update the unit status and receive a new referral. All household members should be exited when a client is no longer receiving services from the program.

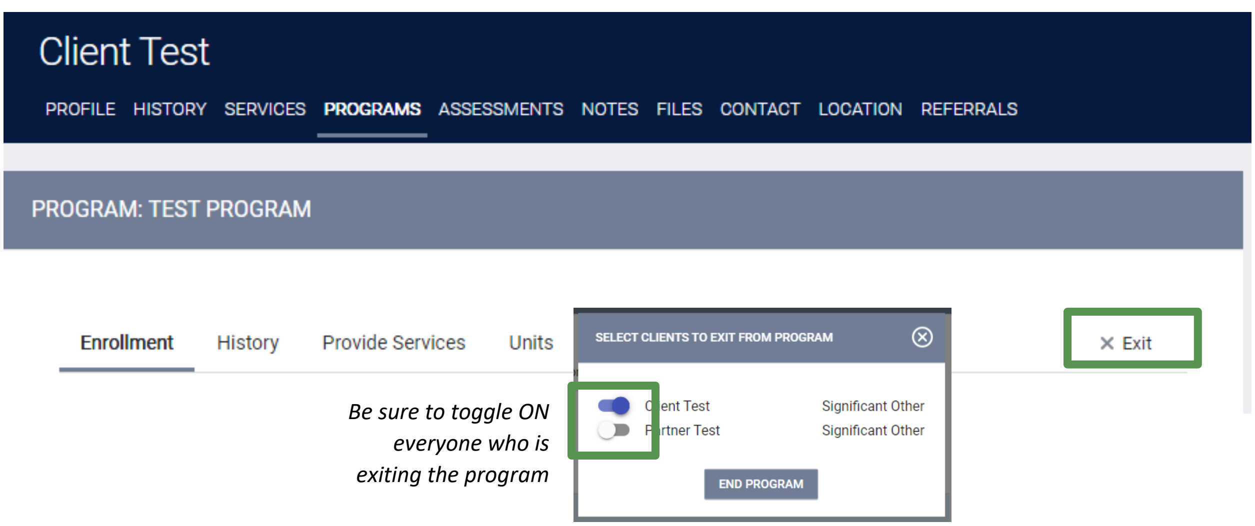
1. Start by ensuring that you are working within the correct agency in ONE. You can change agencies through the dropdown list under your name in the top right corner of the screen.



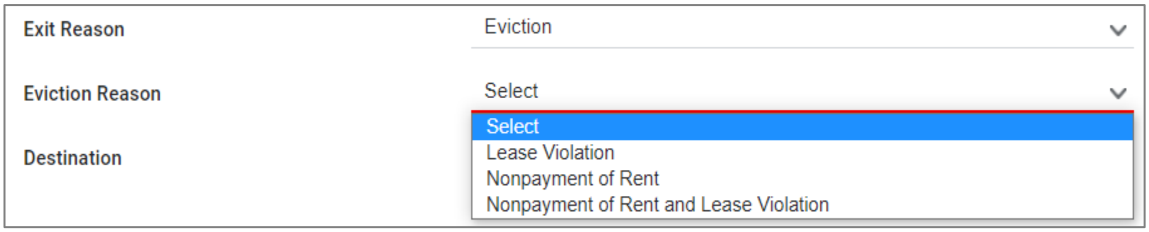
2. From the client's profile, click **Programs** tab, then select the program enrollment. You can also open the program record directly by selecting the client from your **Caseload** list.

   Select the **Exit** button on the far right. Select any additional household members who also need to be exited from the program and unit. Complete exit screens for all selected household members. Pay close attention to the exit reason and destination, as these key fields are used for program and systemwide reporting.

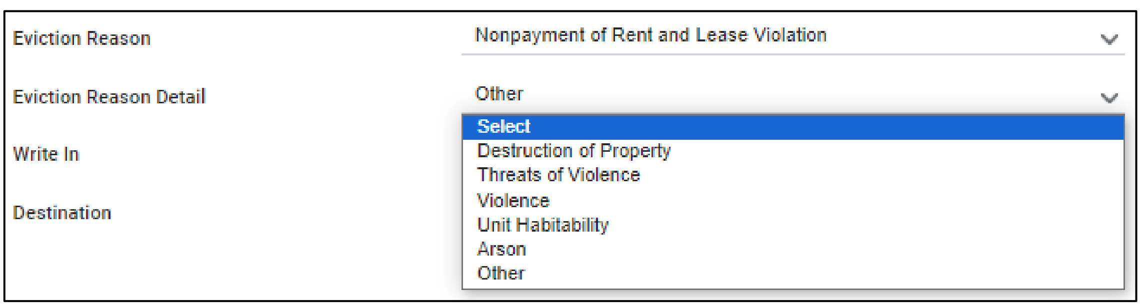
3. Note: If *only* the head of household has exited, you will need to set a new head of household, assign them to the unit, and enter a housing move in date for them. See Managing Households for more information.



a. Enter the **Program Exit Date,** then select the **Exit Reason** and corresponding **Exit Destination.** If **Eviction** is selected as the **Exit Reason,** you must also complete the **Eviction Reason** field by selecting one of the reasons:
   - Lease Violation
   - Nonpayment of Rent
   - Nonpayment of Rent and Lease Violation



b. If **Lease Violation** or **Nonpayment of Rent and Lease Violation** is selected as the **Eviction Reason,** you must also complete the **Eviction Reason Detail** field by selecting one of the following:
   - Destruction of Property
   - Threats of Violence
   - Violence
   - Unit Habitability
   - Arson
   - Other (Write In)

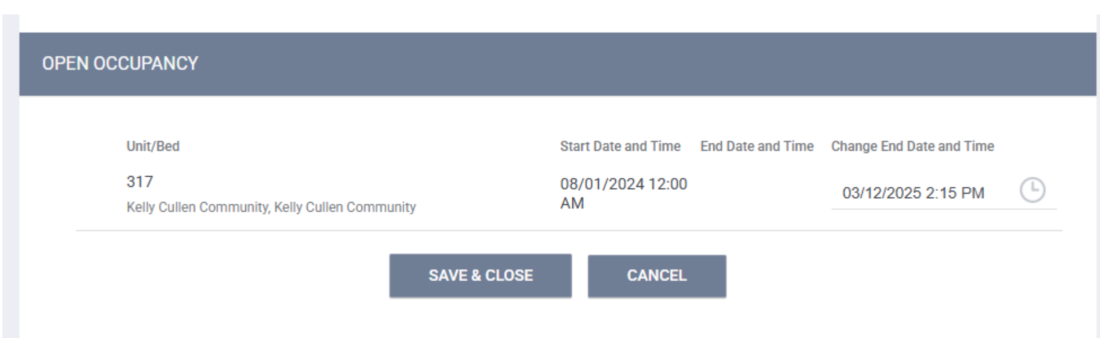


Please ensure these fields are correct as eviction information is reported to the Board of Supervisors annually from the information in ONE.

4. Complete the remaining fields and click **Save & Close.**

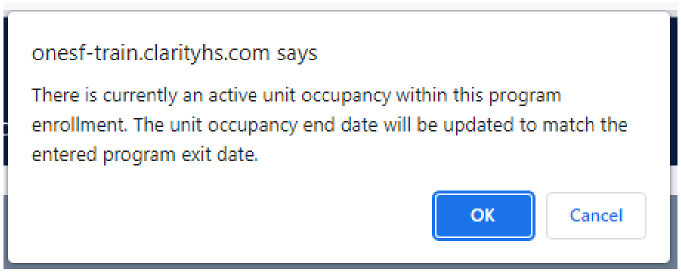
See the table on the next page for a full list of exit reasons and situations where each should be selected.

Exit Reason	Use Cases	Additional Fields
Death	Select only the corresponding Exit Destination of "Deceased"	none
Eviction	Select this reason only when the client has been evicted by the Sheriff	Eviction Reason • Nonpayment of Rent • Lease Violation * • Nonpayment of Rent and Lease Violation * * Eviction Reason Detail (enter when Eviction Reason is Lease Violation)
Exit to Institutional Setting	Use **only** when Exit Destination is one of: • Foster care home or foster care group home • Hospital or other residential non-psychiatric medical facility • Jail, prison or juvenile detention facility • Long-term care facility or nursing home • Psychiatric hospital or other psychiatric facility • Substance abuse treatment facility or detox center	none
Unit Relinquished	Select when the client has voluntarily given up their unit, including when they have transferred to another unit.	none
Unit Abandonment / Client Unseen	Select only when the client has abandoned their unit	none
Other	Select only when none of the other reasons apply AND Select only one of the following corresponding Exit Destinations: • No exit interview completed • Other (note: this should ONLY be used if NO other reason might apply) • Client doesn't know • Client refused • Data not collected	none



The bottom of the exit screen includes information on the open occupancy and will populate with the exit date and time, which you should leave as the default.

By exiting the client from the program, two additional things will also automatically occur: the client will also be exited from the unit and the unit will be placed offline with reason **Automatically Set to Offline**. Select OK to confirm that the unit will be marked offline as of the program exit date:

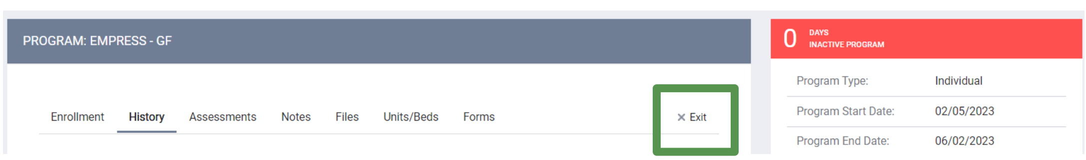


At program exit, the unit's offline reason will be **Automatically Set to Offline**, which will allow Property Management to update the unit record with a specific offline reason or to end the offline status to make the unit available to receive a referral. See Update Units Automatically Set to Offline for more information.

Data Not Collected and Updating Exit Information

Please do not select **Data not collected** unless absolutely necessary. If you obtain missing information after you exit the client, please go back and complete the fields as you receive new information.

To update the exit data after the exit has been completed, click into the enrollment using the edit pencil.



Click on **Exit** to reopen the exit screen. Update the exit fields with any changes, then click **Save & Close**.

Transferring a Client to a New Unit

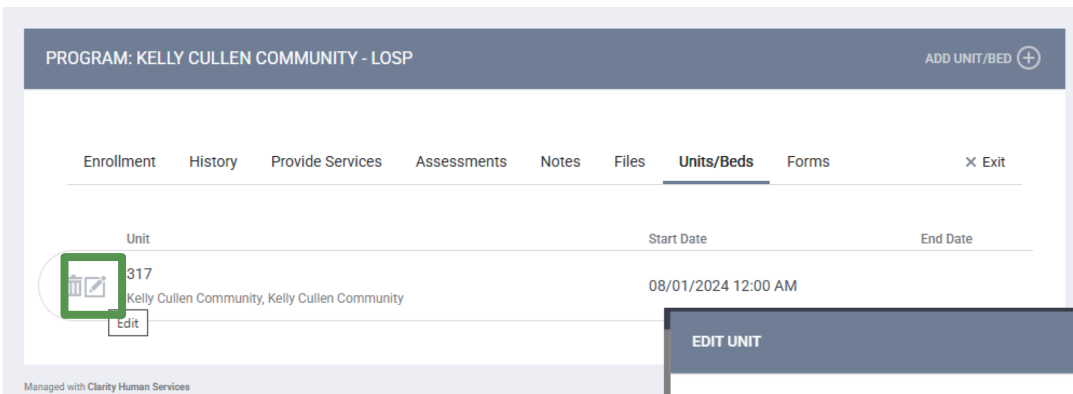
This task is usually completed by ***property managers***.

The ONE System should reflect the unit where each client is staying night-by-night, even if it is only on a temporary basis. This section explains how to transfer a client to a new unit in ONE, whether for a temporary or permanent move.

<u>Transferring Clients to a New Unit in the Same Program</u>

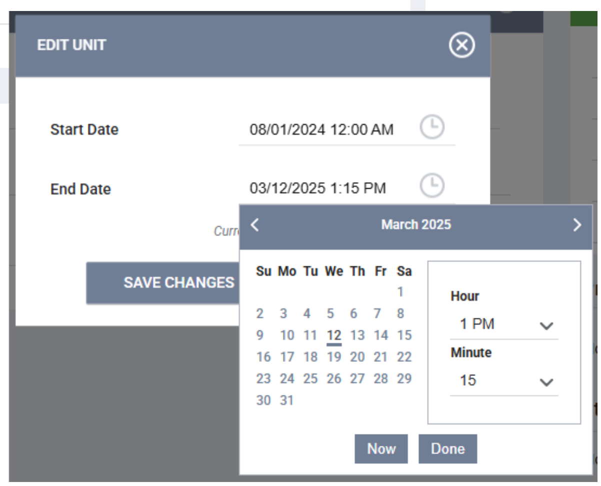
If a client has moved to a new unit within the building, you need to update their ONE System record to reflect this. You will also follow these steps if the client is assigned to the incorrect unit at move-in.

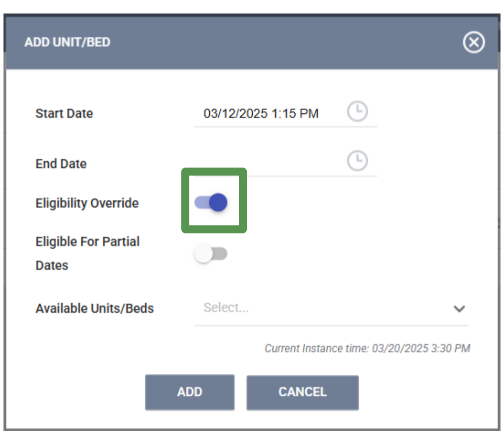
1. Within the client's record, select the **Programs** tab. Open the current program, and select the **Units/Beds** tab.



2. In cases where clients need to transfer units, either temporarily or permanently, changes can be made by clicking the pencil tool next to the unit number.

3. Open the unit and enter the end date. The unit will go offline with the reason "Automatically Set to Offline," so you should either update the offline reason to the actual reason or end the offline status to make the unit available.





4. Assign the client to a new unit by selecting the **Add Unit/Bed** option on the right side of the screen.

5. In the pop-up, fill in the start date and *leave the end date blank*. Turn on the **Eligibility Override** toggle. Under the **Available Units**, select the correct unit, and confirm to assign the client into their new unit.

If you still do not see the unit, make sure the unit is available.

Be sure to update the automatic offline status that will be created for the newly vacated unit if it is offline **or** update the end date of the automatic offline status if the unit is available for referral.

Note: If a client is moving from a unit in one program to another program with the same provider via an internal transfer, the client must be exited from the current program and enrolled in the new program before the new unit can be assigned.

Transferring Clients to a Unit in a Different Program

If a client is moving to a different program/building, they will need to be exited from the current program and enrolled in their destination program before they can be assigned to their new unit. In these situations, there will not be a referral to the new program/unit.

Support Services

1. Exit tenant from current program as of the calendar day before the move and choose the following options for these three fields:
    - Exit Reason: "Unit Relinquished"
    - Destination: "Rental by client, with ongoing housing subsidy"
    - Rental Subsidy Type: "Permanent Supportive Housing"
2. Enroll client into the new program as of the date of the move and choose the following options for these two fields:
    - Prior Living Situation/Type of Residence: "Rental by client, with ongoing housing subsidy"
    - Rental Subsidy Type: "Permanent Supportive Housing"

Property Management

1. Ensure the unit the client is transferring into is available by ending an offline status if necessary. Units must be available on or before the date/time you will assign the client to the unit.
2. From the client's profile, open the program enrollment and add the unit assignment to the new unit.
3. Update the automatic offline reason that will be created for the newly vacated unit if it is truly offline or end the automatic offline status by entering an end date if the unit is available. See Update Units "Automatically Set to Offline".

Offline Reasons

Setting units to offline and ending the offline status to bring those units back to available is an essential part of the housing workflow. Data on the offline reasons is included in reporting and decision-making, so it is important to select the most accurate and appropriate reason when marking a unit offline.

Each offline reason is prefixed by the corresponding program areas where it may be used:

- **HSG** (housing)
- **SHLTR** (shelter)

For any questions not answered in this chart, please contact your supervisor or HSH program manager.

Reason Name	Definitions	Time Offline
Automatically Set to Offline	The unit or bed was automatically set to offline with this reason by the system when the previous household was exited from the program. Update this status to the actual offline reason within three business days.	Maximum 3 business days
HSG – Building Rehab	Planned building rehab/construction: written notification and timeline submitted to HSH Program Manager prior to setting unit offline.	Varies
HSG – Coroner Hold	The unit is held pending a coroner or medical examiner review, or public administrator notification of next of kin.	30-90 days
HSG – Internal Transfer	The unit is held for an in-program transfer, such as a reasonable accommodation move or other transfer from another unit within the same provider's portfolio.	30 days
HSG – Occupied by Legacy Tenant	The unit is currently occupied by a legacy tenant who is not enrolled in the program in ONE.	Ongoing
HSG – Occupied but No Client ROI	The unit is currently occupied by a client refusing to sign an ROI, meaning they cannot be enrolled in the program in the ONE System.	Ongoing
HSG – Occupied Temporarily by Client from Other Program/Building	The unit is temporarily occupied by a client who is enrolled in another program or building, and therefore cannot be assigned to the client.	30-90 days
HSG – Significant Damage	Unit with significant damage due to fire, flood, or other significant incident.	90 days
HSG/SHLTR – Janitorial/Maintenance	The unit is unavailable for client placement due to janitorial or maintenance needs.	14-30 days
HSG/SHLTR – Property Hold	The unit is unavailable due to a property hold. This status can also be used for property management needs that are not covered by any other offline reason. Please include notes explaining the circumstance.	30 days
SHLTR – Hospital Hold	The unit or bed is held for a client who is temporarily at a health care facility. Not used for housing.	
SHLTR – Jail Hold	The unit or bed is held for a client who is temporarily incarcerated. Not used for housing.	

Set Unit Status to Offline or Back to Available After Being Offline

This task is usually completed by ***property managers***.

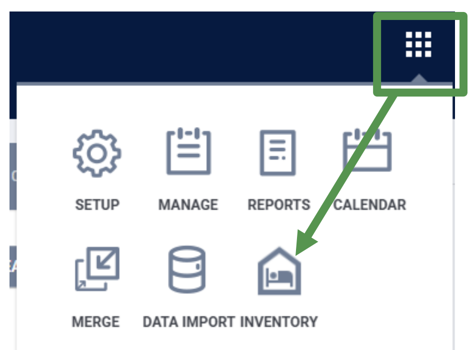
If a unit needs repairs or other updates before it is ready for a new client or otherwise temporarily unavailable, the unit status can now be set offline in ONE. Any time a unit is unavailable for a client to move in right away, it should be set to offline.

In cases where a client is residing in a unit that needs repairs, the process to transfer the client should be followed to transfer the client into their temporary unit. The leased unit should be set to offline following the process below. Once repairs are complete, the unit status can be set back to available by adding an end date to the offline status. This will make the unit available, and the client can be transferred back into their original unit in ONE again. If a unit needs to be set to permanently offline, please contact your HSH Program Manager to have the status set to Inactive. *Do not set units to Inactive without contacting HSH.*

Once a unit is Inactive, you will not able to view the unit unless you run a building roster or the inactive units report. If you accidentally add an Inactive status, contact the Help Desk (onesf@bitfocus.com) to remove it.

If a unit remains offline but the reason for it being offline changes, a new offline status should be added to ensure the history of the unit is accurately recorded. For example, if a unit is under a coroner hold for two months and then is unavailable due to repairs, each window of time should be reflected in a unique offline status. If the offline reason changes, click the blue (+) to add a new offline status. This will automatically end the former offline status and allow you to record the updated offline reason.

Make a Unit Offline

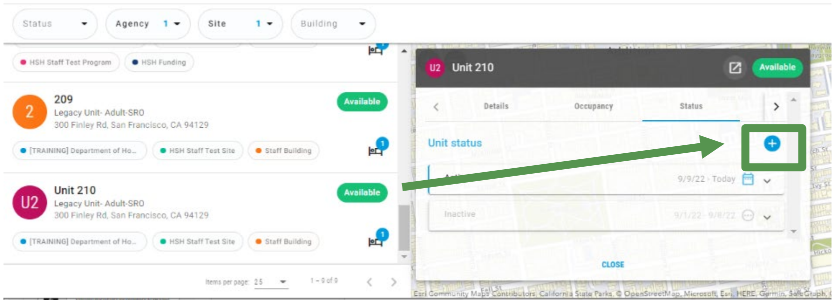


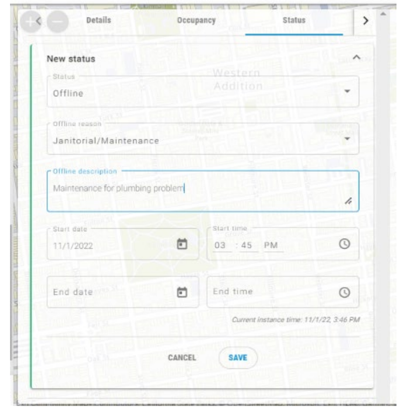
1. In cases where a unit is not ready for a new client immediately, the unit should be set to offline. To do so, ensure you are in the agency associated with the program/building and then go to the **Inventory Dashboard**, which can be found under the waffle tool.

2. Select the Building by using Building filter at the top of the page.

3. Select the appropriate unit to see the unit's pop-up display card. Click the **Status** button, then find the **(+)** to add an offline status.

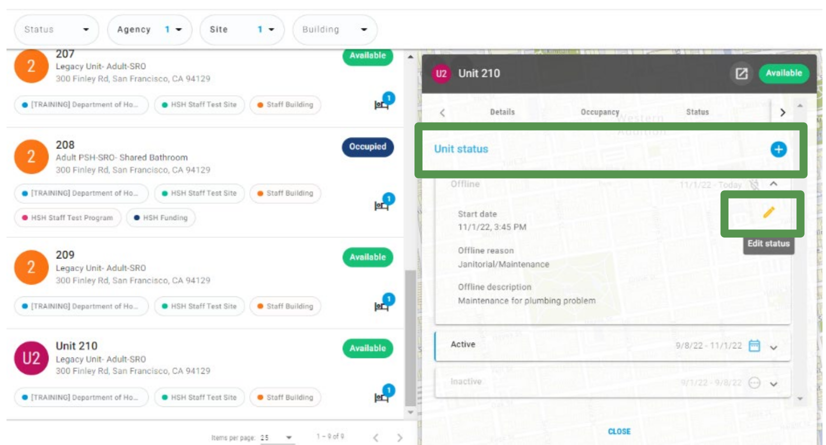
4. Select **Offline** under **New Status**. (Do *not* use Inactive.) Select the appropriate offline reason and add in any needed notes. Select the appropriate date and time. A unit cannot be both offline and online at the same time, so selecting the right time is important. Leave the End Date for the offline status as blank. Even if you have a projected date the unit will be available, leave the End Date blank until the unit is actually available again.





5. If the offline reason has not changed but you have additional information to add to the offline description field, click the pencil icon to edit the offline status.

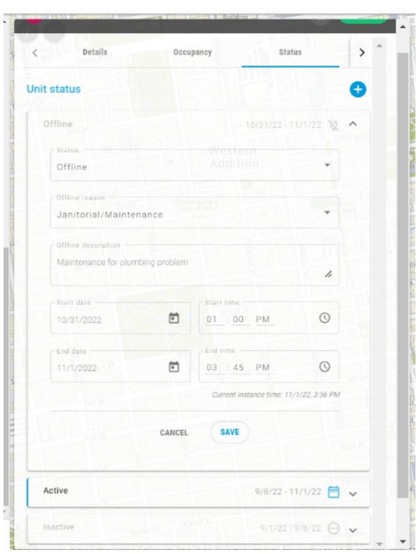
End an Offline Status to Update Unit Status Back to Available



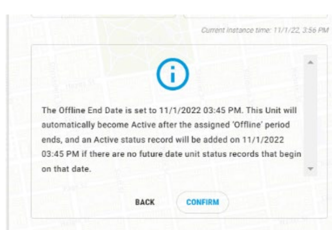
1. When a unit is ready to be marked as Available, open the **Status** section again. Find the most recent **Offline Status**, which will be grey. Click the status entry to expand:

2. Select the pencil tool to edit this offline status (Note! The pencil will only appear if you are under the agency associated with the program/building, so you may need to switch agencies and try again if you are a user with access to multiple agencies in ONE).

3. Add an end date to the offline status. We recommend leaving the time to the default of 12 AM. Saving an end time that has already passed will update the status change immediately.



4. Once you press save, a pop-up will prompt you to confirm that this will set the unit to active. Select **Confirm** to finalize the status change. The unit will now appear available.



Update Units "Automatically Set to Offline"

When a unit assignment is ended, the unit will become automatically offline and you will need to update the offline reason within 3 days. Unit assignments are ended when a client is exited from a program, a client transfers to another unit within the same program, or when a client moves into a unit that does not match the unit to which the client is referred.

1. Ensure you are in the agency associated with the program/building and then go to the **Inventory Dashboard**, which can be found under the waffle tool. You will only be able to edit the offline reason if you are under the agency associated with the program/building.
2. Select the building and the appropriate unit to see the unit's pop-up display card. Click the **Status** button and find the most recent **Offline Status**, which will be grey. Click the status entry to expand and edit the entry. You'll only see the pencil icon to edit if you are under the correct agency
3. Update the **Offline Reason** field by selecting the most appropriate reason for the vacancy.
4. Delete the text that appears in the **Offline Description** field and add any necessary details here.
5. *Leave the **End Date** for the offline status as blank*. Even if you have a projected date the unit will be available, leave the End Date blank until the unit is actually available again. If you see an end date in the 2050s, you may leave it, as it is automatic and will be removed.

Managing Households

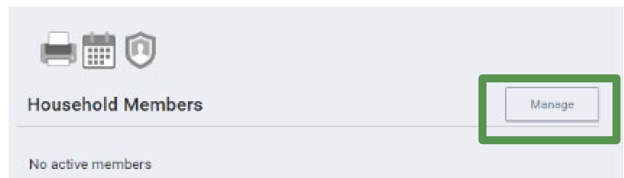
Both ***property managers*** and ***service providers*** are responsible for ensuring households are appropriately managed in ONE.

All information below covers specific data requirements for households.

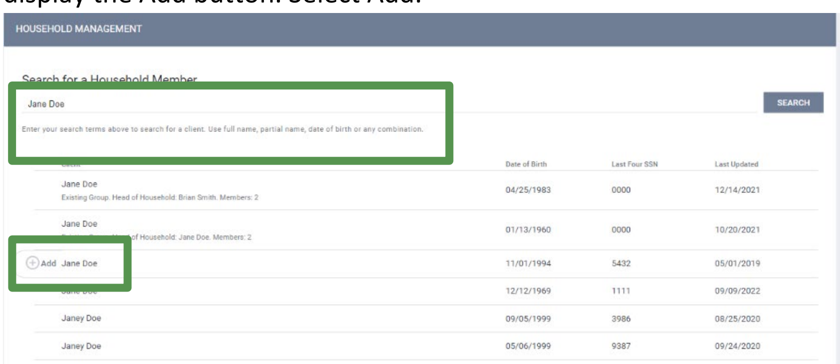
Households need to be correctly connected and associated in ONE to ensure that data is accurate and households jointly receive services as needed. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. However, household members listed in ONE do not *have* to live together or be enrolled in programs together.

1. Households need to first be connected at the profile level.

    a. New members can be added at the right of the client's profile screen, under **Household Members.** Select **Manage** to begin.

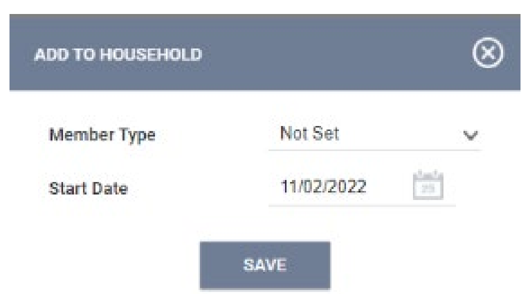


    b. Enter the name of the additional household member into the search bar. Verify you have found the correct person using the date of birth or last four of their SSN, and hover over their name to display the Add button. Select Add.

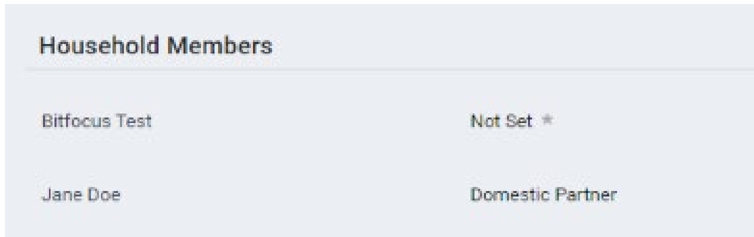


    c. If you do not find the new household member, you will need to add a profile for them. If this is the case for any adults, [be sure you have a completed ROI on file](#).

    d. A window will pop up that allows you to select the relationship and the date that the secondary household member joined the household. This date should be on or before the date that the household moves into the unit.

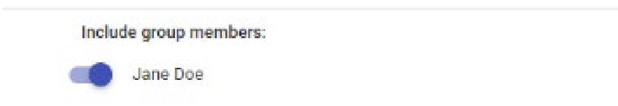


e. Once complete, the household members will be listed on the right side of either client's profile. The individual with the star is designated as the Head of Household. You can then edit the head of household's relationship.

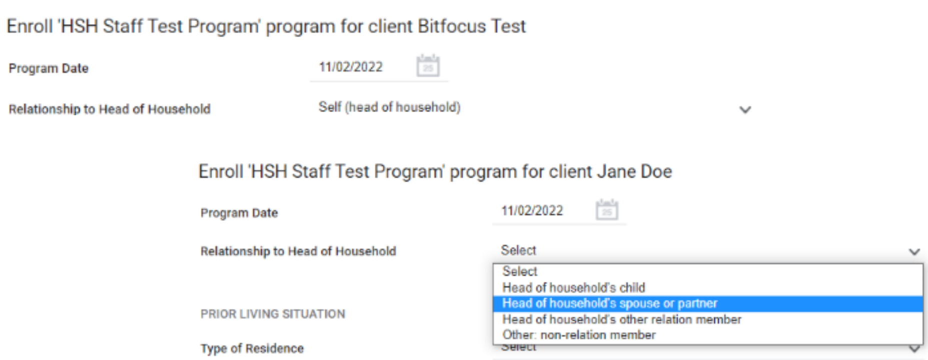


2. Clients need to be connected as a household at the profile level in order to enroll them into a program together.

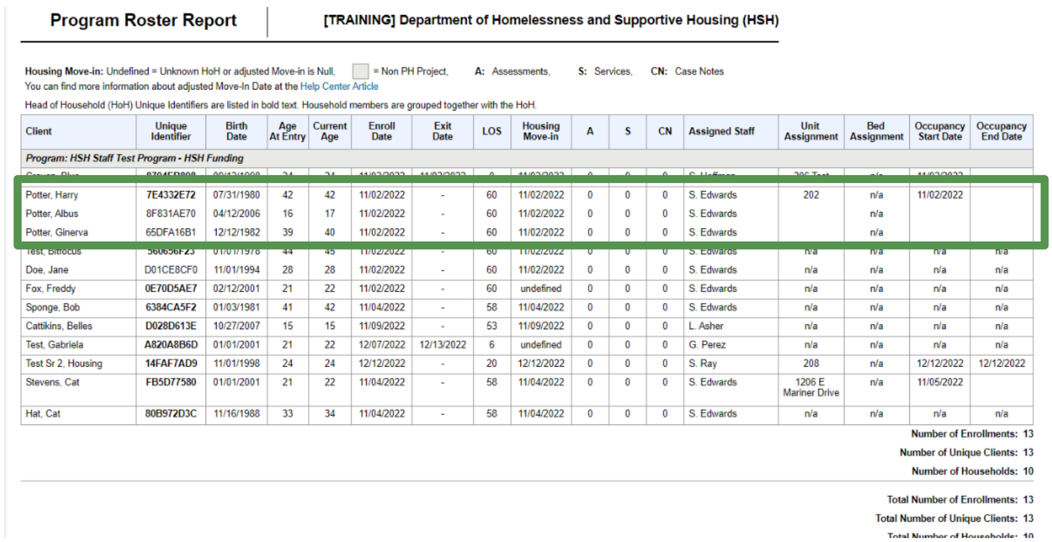
   a. When completing the enrollment, find the section that says Include Group Members. Toggle this on for any members of the household that will also be living at this site.



   b. When enrolling, an enrollment screen will appear for each household member. The relationship to the Head of Household must be designated for each household member. The Head of Household should be the individual with the primary eligibility for the program. If the eligible person was not already set as Head of Household at client profile level, edit to reflect appropriate head of household.



   c. Once the enrollment is complete, *only the head of household* should be assigned to a unit. In reports, that will show as all household members under the same unit in one row. Errors will occur if the additional household members are assigned to the unit instead.



Program Roster Report | **[TRAINING] Department of Homelessness and Supportive Housing (HSH)**

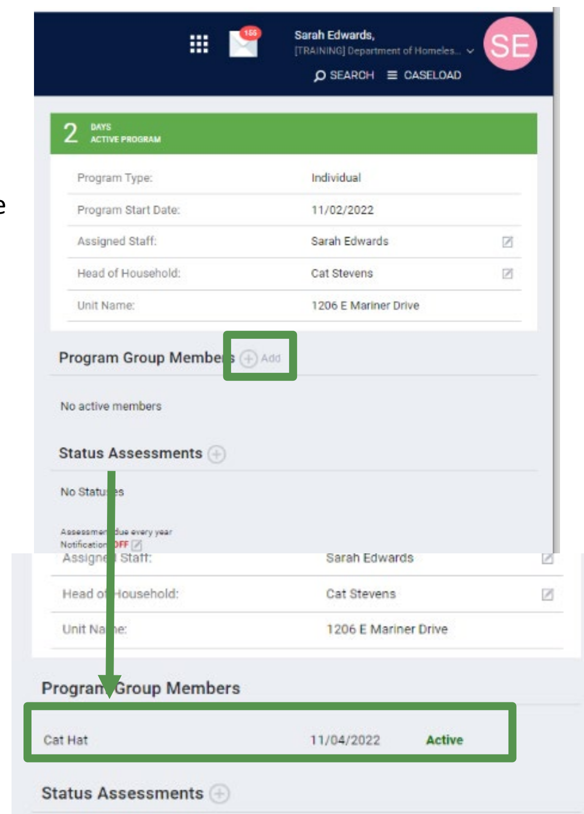
Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article
Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
Program: HSH Staff Test Program - HSH Funding																
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
Potter, Harry	**7E4332E72**	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	[illegible]	[illegible]	44	45	[illegible]	-	60	[illegible]	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	**0E70D5AE7**	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	**6384CA5F2**	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	**D028D613E**	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	**A820A8B6D**	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	**14FAF7AD9**	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
Stevens, Cat	**FB5D77580**	01/01/2001	21	22	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/05/2022	
Hat, Cat	**80B972D3C**	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a

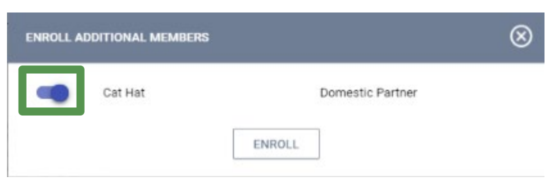
Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 10

Total Number of Enrollments: 13
Total Number of Unique Clients: 13

3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.



   a. Follow the instructions to link the household member to the client's profile.
   b. Open the head of household's program enrollment, and look for Program Group Members on the right side of the screen. Select **(+) Add** to add in the other household members.
   c. A pop-up window will appear with all household members listed. Toggle on those that you wish to add to the enrollment. Anyone who will be residing in the unit should be added to the enrollment.



   d. Select **Enroll**, which will prompt you to complete the enrollment screen for the additional household member(s). Once completed, household members will show under **Program Group Members** for the original enrollee.

4. If a household is incorrectly enrolled and both members are enrolled in the program separately, only one will show as associated with a unit, and any others will show as n/a. To join these individuals into a group enrollment, you will need to work with the Bitfocus help desk (onesf@bitfocus.com).

Program Roster Report | **[TRAINING] Department of Homelessness and Supportive Housing (HSH)**

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
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Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

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Program: HSH Staff Test Program - HSH Funding																
Crayon, Blue	**8704EB898**	09/12/1998	24	24	11/02/2022	11/02/2022	0	11/02/2022	0	0	0	S. Hoffman	206 Test	n/a	11/02/2022	
Potter, Harry	**7E4332E72**	07/31/1980	42	42	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	202	n/a	11/02/2022	
Potter, Albus	8F831AE70	04/12/2006	16	17	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	**560656F23**	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	**0E70D5AE7**	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Sponge, Bob	**6384CA5F2**	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	**D028D613E**	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	**A820A8B6D**	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	**14FAF7AD9**	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022
Stevens, Cat	**FB5D77580**	01/01/2001	21	22	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/05/2022	
Hat, Cat	**80B972D3C**	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a

Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 10

Total Number of Enrollments: 13
Total Number of Unique Clients: 13
Total Number of Households: 10

*Note: * denotes Inactive Assigned Staff*

a. First, review the household at the profile level and ensure that the household members are in a group together and the appropriate person is set as head of household. Confirm that the date of the household grouping is on or before the date of that the household moved in together.
b. Then email the Bitfocus help desk at onesf@bitfocus.com. In the email, include the unique identifier of all household members. Be sure note which member should become the head of household for the enrollment and their relationship to the HoH. The help desk will then update the enrollments so they are grouped as a household.
c. Once the household is grouped, open the enrollment for each household member and ensure that the relationship is appropriately defined.

Relationship to Head of Household — Select

- Select
- Self (head of household)
- Head of household's child
- Head of household's spouse or partner
- Head of household's other relation member
- Other: non-relation member

PRIOR LIVING SITUATION

Type of Residence

Household Splits – Separating Enrollments

There are various scenarios that could occur that affect the way you will need to update ONE to properly reflect a household split. Here are two examples.

1. If one household needs to be changed from a group enrollment to individual enrollments to reflect that they are now two separate households, still enrolled in the same program:

a. Exit the household member from the Group enrollment as of the calendar day before the move and choose the following options for these 3 fields:
   - Exit Reason: “Unit Relinquished”
   - Destination: “Rental by client, with ongoing housing subsidy”
   - Rental Subsidy Type: “Permanent Supportive Housing”

The Head of Household's enrollment will then become an Individual enrollment and nothing will need to be done (unless the unit assignment needs to be updated)

b. Re-enroll the household member to the program as of the day of the move and choose the following options for these 2 fields:
   - Prior Living Situation/Type of Residence: “Rental by client, with ongoing housing subsidy”
   - Rental Subsidy Type: “Permanent Supportive Housing”
   - Assign the unit

2. If a head of household is exited from the program before other household members, who need to remain enrolled in the program:
   a. The unit will automatically become offline and the property management staff will need to add an end date to the automatic offline status. The end date/time should match the start date/time. See Update Units “Automatically Set to Offline”
   b. Assign a remaining household member as the head of household in the program enrollment and update other household members relationship to the new head of household if necessary. You must assign this household member at least 15 minutes after the end date of the offline status created by the head of household’s exit.
   c. Add the housing move in date for the new head of household. This should be the same as the program start date.
   d. Assign the new head of household to the unit.

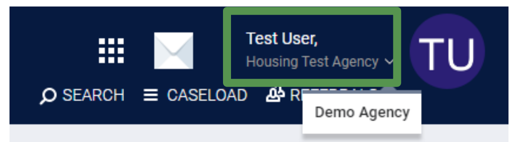
Annual Assessments in ONE

This task is completed by ***service providers*** in ONE.

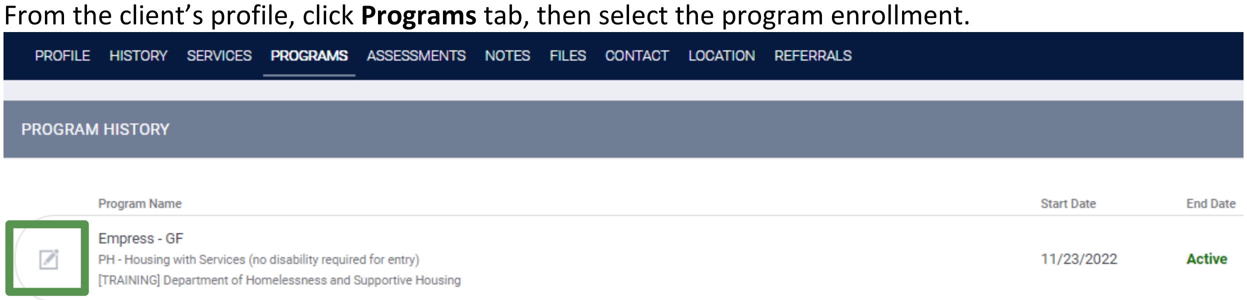
Complete an **Annual Assessment** within (before or after) 30 days of client's anniversary date in the program.

Service providers must complete an Annual Assessment for all PSH tenants. Annual Assessments collect updated information about clients enrolled in the ONE System. While necessary for reporting requirements, Annual Assessments also help ensure continuity of care across the Homelessness Response System. Annual Assessments should be completed on or near the client's anniversary date which means they will need to be completed on a rolling basis across all clients in the building.

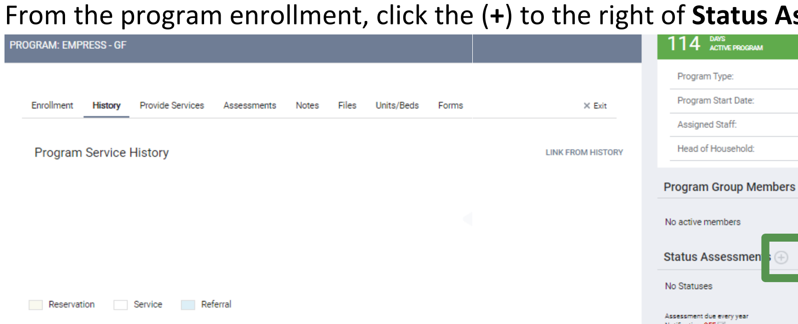
1. Start by ensuring that you are under the correct agency. You can change agencies through the dropdown list under your name in the top right corner of the screen.



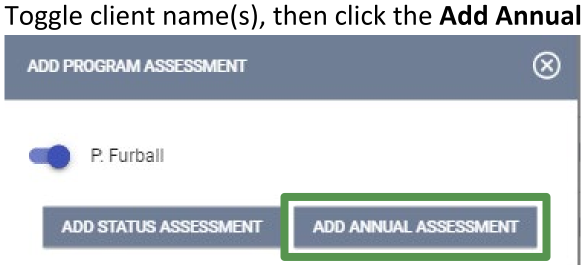
2. From the client's profile, click **Programs** tab, then select the program enrollment.



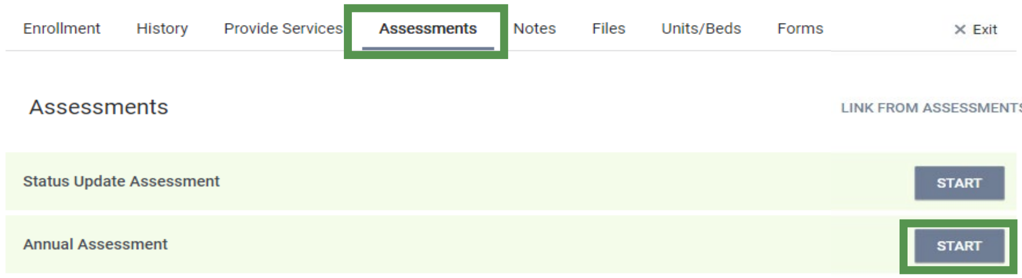
- Method 1:
  - From the program enrollment, click the (**+**) to the right of **Status Assessments**



  - Toggle client name(s), then click the **Add Annual Assessment** button



  - Complete the Annual Assessment, then click **Save and Close**
- Method 2:
  - From the program enrollment, click the Assessments tab



- Click the Start button on Annual Assessment
- Toggle client name(s) on, then click the Add Annual Assessment button
- Complete the Annual Assessment, then click Save and Close

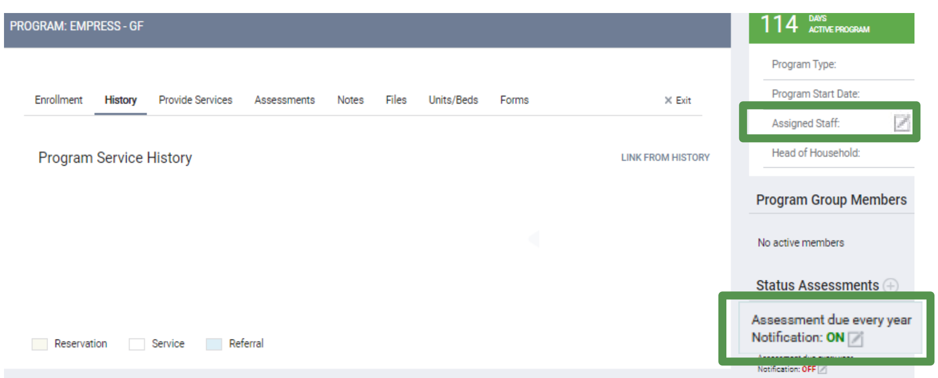
Adding Annual Assessment Warnings

Staff can set assessment warnings to receive a notification when the annual assessment is due for a client on their caseload. There are two different ways to manage notifications in the system.

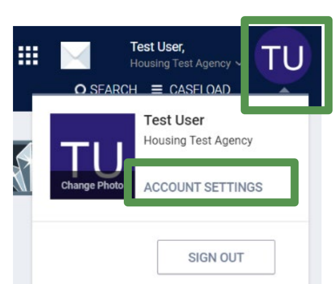
1. Individually: Program Enrollments

   a. Make sure you are an assigned staff on the client's enrollment. If you do not see your name next to **Assigned Staff**, click the **Edit** icon to add yourself.

   b. Click the **Edit** icon to toggle on **Assessment due every year** notifications



2. Globally: User Account Settings
   a. Click your user icon (usually your initials) at the top right of the screen, then click **Account Settings**
   b. At the bottom of the **My Info** screen, toggle on the **Assessment Due Warning**, set the timeframe desired, and click **Save Changes.**



For every enrollment you complete after turning on the user level assessment due warnings, the **Assessment due every year notification** will automatically be toggled on and you will receive notifications. Note: if you have previously completed enrollments and did not turn on the Assessment Due Warning notifications individually, you will need to go back and turn them on in each client's program enrollment.

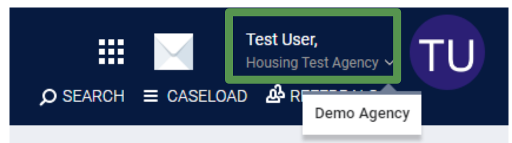
Tracking Eviction Notices & Unlawful Detainers for PSH Programs

This task is completed by ***service providers*** in ONE.

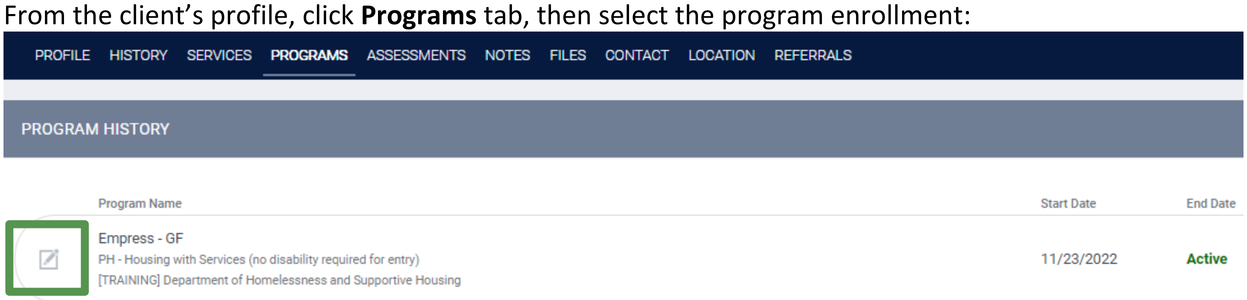
Enter the **Eviction Activity Service** by the 15th of the month following the actual service date on the tenant.

Eviction Notice and Unlawful Detainer data helps HSH gather trends for both internal and external review and learning. Internally, HSH will use this data to understand eviction and unlawful detainer trends across the system and overlay ONE system demographic data to understand these trends through an equity lens. Externally, HSH can report trends and findings to the Homelessness Oversight Committee and Board of Supervisors. Each eviction notice and Unlawful Detainer (UD) served on a tenant should be entered as a Program Service in ONE.

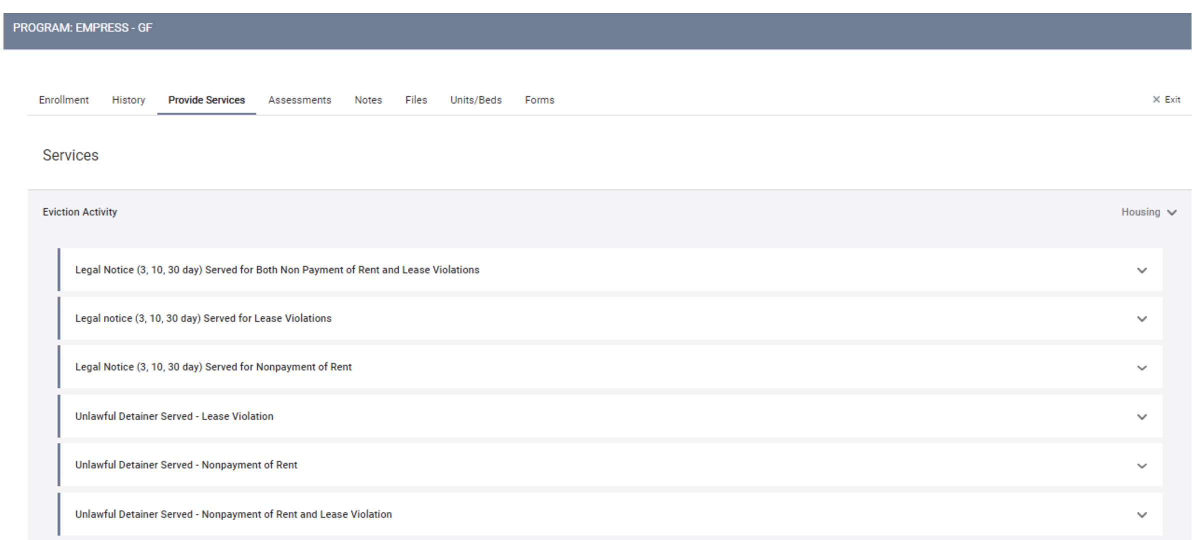
1. Start by ensuring that you are working within the correct agency in ONE. You can change agencies through the dropdown list under your name in the top right corner of the screen.



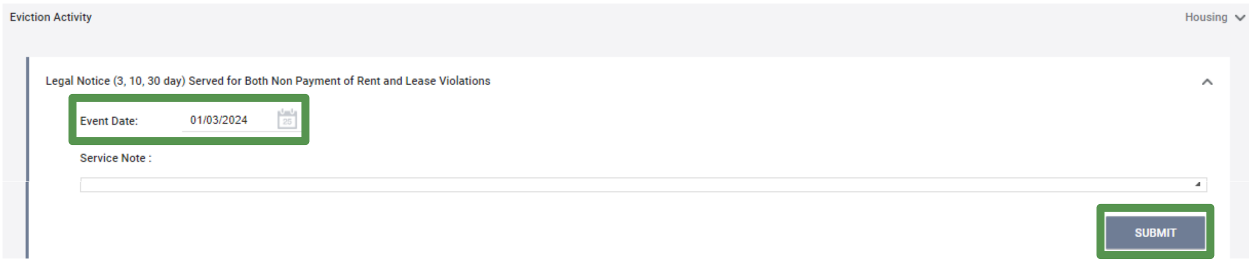
2. From the client's profile, click **Programs** tab, then select the program enrollment:



3. From the enrollment screen, click the **Provide Services** tab, then select **Eviction Activity,** then select the appropriate item: **Legal Notice** or **Unlawful Detainer,** and the reason.



4. For each notice or Unlawful Detainer served on the tenant, enter the **Event Date** (this should be the actual date the notice or Unlawful Detainer was served on the tenant), then click **Submit**.



Data entered on Eviction Activity is available in the ONE System under the Data Analysis tab. See SF ONE System Reports > Data Quality Reports > [Eviction Reporting] for a data quality dashboard of Eviction Notices and UDs served, Evictions, and Lease Violation Eviction Details.

Review Housing Reports for Accuracy

Both ***property managers*** and ***service providers*** are responsible for accurate data in ONE.

Check reports weekly to ensure accuracy.

Pay attention to reviewing appropriate sections for households.

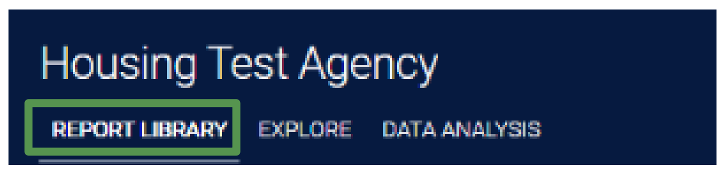
It is recommended that program staff review rosters at least weekly to ensure that the information in ONE is accurate. To confirm that clients are associated with their current units in ONE, review the **Program Roster Report**, which includes the unit numbers associated with a client's program enrollment. This report is available under the Report Library. All other reports are in the Data Analysis tab.

To confirm that units are correctly identified as occupied, offline, or available, review the **Building Roster Report**. Review the **Housing Inventory Snapshot** to see a summary count of units by status. The **Properties of Buildings** and **Properties of Units** reports include the information in the system about each building and unit so that you can view and review them for accuracy.

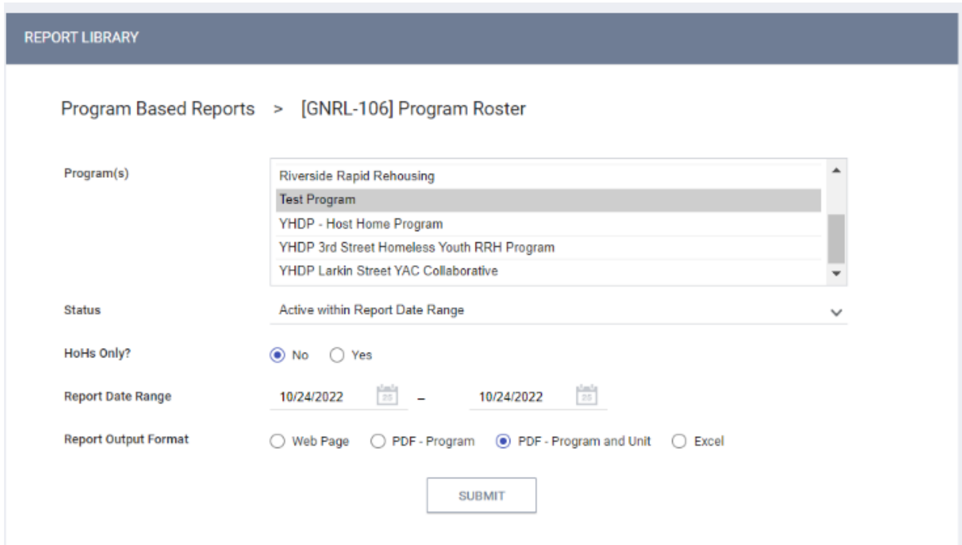
Both Service Providers and Property Managers are responsible for ensuring that the data in ONE is accurate. Below are the primary reports that will help with data quality.

Program Roster

1. Ensure you are under the correct agency in ONE.
2. Within the waffle tool, select Reports.
3. Under the Report Library, expand Program Based Reports. Find **Program Roster**, and click to run.



4. You can select either the web or Excel version, which will include the unit information, or select the PDF version that includes both the program and unit.



5. Review the report for accuracy. Clients will either show as having a unit number under the **Unit Assignment** column or n/a. Households that are appropriately enrolled together will be listed within the same section with one unit listed in the unit assignment cell. Households that are incorrectly enrolled will have one individual with a unit and the other household members' units will appear as n/a. All clients must have a move-in date associated with their enrollment, and the move-in date must be on or after the program start date so any showing as undefined must be updated or program start date must be updated.

Program Roster Report | **[TRAINING] Department of Homelessness and Supportive Housing (HSH)**

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
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Potter, Ginerva	65DFA16B1	12/12/1982	39	40	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards		n/a		
Test, Bitfocus	**560656F23**	01/01/1978	44	45	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Doe, Jane	D01CE8CF0	11/01/1994	28	28	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Fox, Freddy	**0E70D5AE7**	02/12/2001	21	22	11/02/2022	-	60	undefined	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Stevens, Cat	**FB5D77580**	01/01/2001	21	22	11/02/2022	-	60	11/02/2022	0	0	0	S. Edwards	1206 E Mariner Drive	n/a	11/02/2022	
Hat, Cat	80B972D3C	11/16/1988	33	34	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards		n/a		
Sponge, Bob	**6384CA5F2**	01/03/1981	41	42	11/04/2022	-	58	11/04/2022	0	0	0	S. Edwards	n/a	n/a	n/a	n/a
Cattikins, Belles	**D028D613E**	10/27/2007	15	15	11/09/2022	-	53	11/09/2022	0	0	0	L. Asher	n/a	n/a	n/a	n/a
Test, Gabriela	**A820A8B6D**	01/01/2001	21	22	12/07/2022	12/13/2022	6	undefined	0	0	0	G. Perez	n/a	n/a	n/a	n/a
Test Sr 2, Housing	**14FAF7AD9**	11/01/1998	24	24	12/12/2022	-	20	12/12/2022	0	0	0	S. Ray	208	n/a	12/12/2022	12/12/2022

Number of Enrollments: 13
Number of Unique Clients: 13
Number of Households: 9

Total Number of Enrollments: 13
Total Number of Unique Clients: 13
Total Number of Households: 9

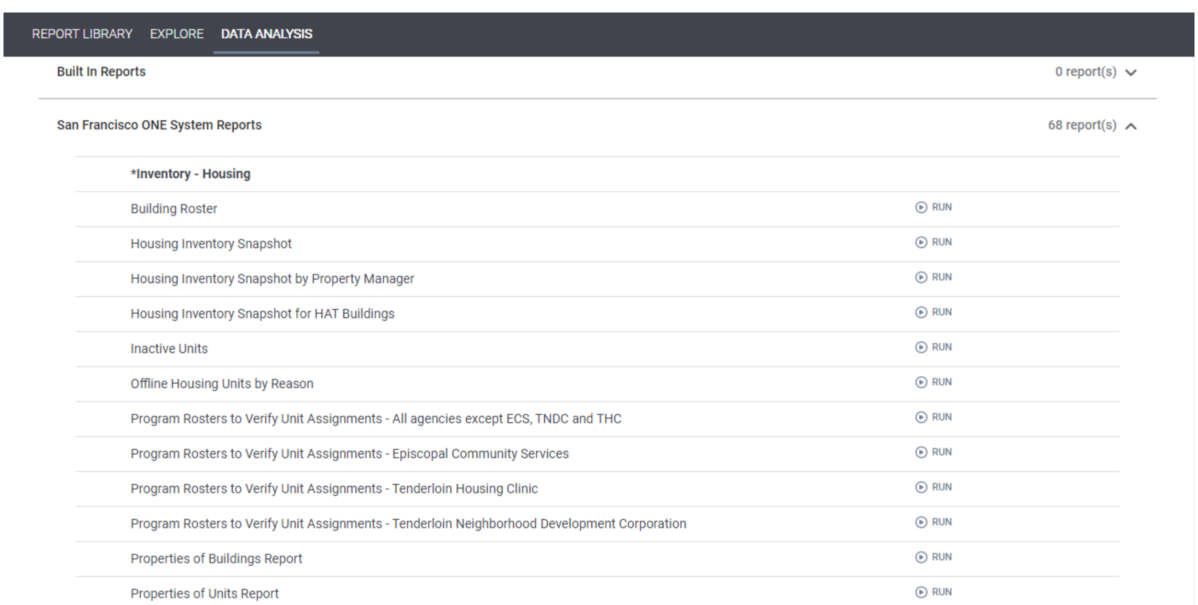
*Note: * denotes Inactive Assigned Staff*

Program Roster Troubleshooting Tips:

- *If a client does not appear on the program roster report,* they must be enrolled in the program. See Accept and Enroll Client in a Program.
- *If a client appears on the program roster report, but their unit is incorrect*, they need to be associated with their current unit. See Transferring a Client to a New Unit.
- *If a client has "N/A" in the unit column,* this could be one of two issues:
  - The client is associated with a unit, but does not have a move-in date entered in their enrollment. See Step 6 of Accept and Enroll Client in Program. Any housing move-in dates showing as "undefined" should be updated to reflect the date the client moved into the building.
  - The client is a member of a household that was not enrolled together. See Managing Households for instructions on linking clients within households and updating enrollments to accurately represent all tenants within a unit.
  - Another household member may be assigned to the unit, rather than the Head of Household. If this is the case, the HoH should be assigned to the unit or the HoH needs to be updated to the client assigned to the unit.

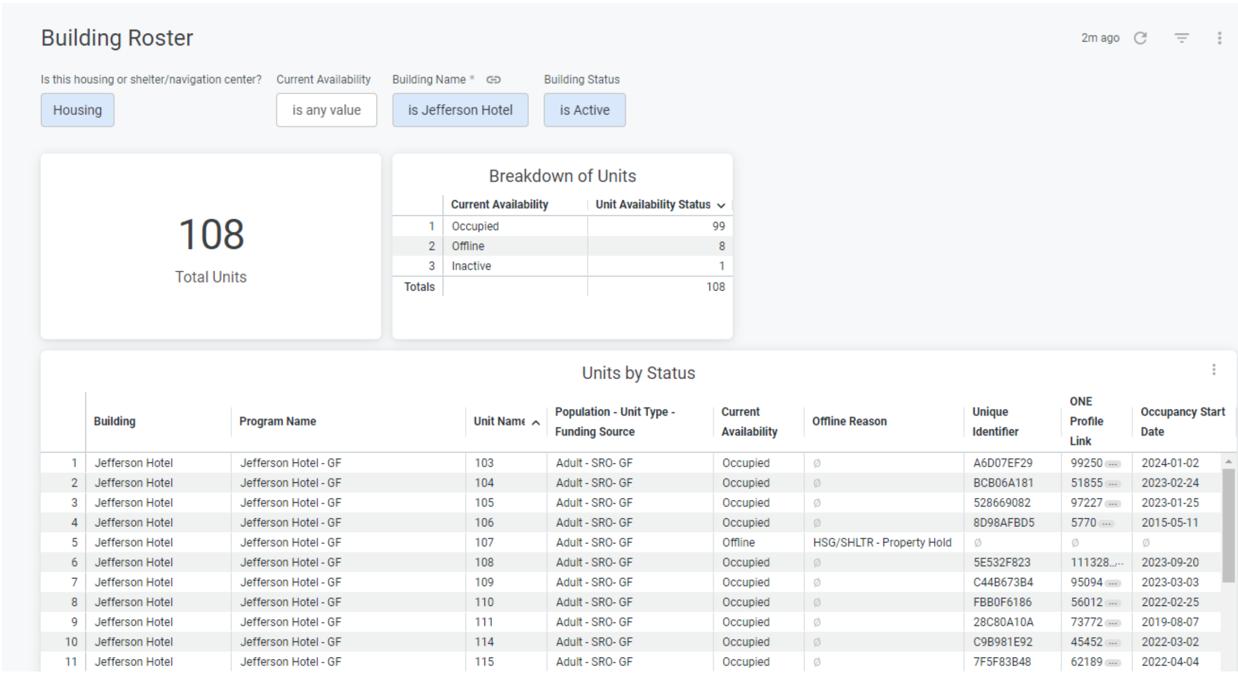
Accessing Reports in the Data Analysis Tab

1. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. It often takes longer to load than other pages in the ONE System.
2. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory - Housing**, there are custom reports for various purposes:
   Building Roster: Includes all clients in a building with unit assignments
   Housing Inventory Snapshot: Displays total units by status in each building
   Properties of Buildings/Units: Includes information about each building and unit in the ONE System



Building Roster

1. Under the waffle tool, select **Reports**. Select the **Data Analysis** tab. Select **San Francisco ONE System Reports** to expand the menu. Under **Inventory**, select the **Building Roster**.



2. The **Building Roster Report** provides information on the status of each unit in a building. Information on each client associated with a given unit is also presented in this report (client information removed below). Select the desired building and then click **the blue circular update arrow** [ ] to refresh the report.

Building Roster Troubleshooting Tips:

- *If a client appears on this report who no longer lives in your building*, they need to be exited from the program to also exit them from the unit record in ONE. See Exit Client from a Program.
- *If a client appears on the report, but their unit is incorrect*, they need to be associated with their current unit. See Transferring a Client to a New Unit.
- *If a current tenant does not appear on the report,* they must be enrolled in the program and their current unit verified. See Accept and Enroll Client in a Program and Transferring a Client to a New Unit.
- If a unit's status is incorrect, it must be updated. See Managing Offline Units.
- If a unit is pending occupancy status and the household that is referred is incorrect, communicate with the referring user to update. See Managing Referrals.

Housing Inventory Snapshot

1. The **Housing Inventory Snapshot** defaults to a portfolio level view of all site-based housing units in ONE, but users can filter for a specific agency or housing program. Be sure to refresh the report using the **blue circular update arrow** [ ] whenever you update the filters. The count of units in each of the different statuses is displayed.

*Inventory - Housing

Housing Inventory Snapshot

4m ago

Agency Name: is any value | Program Name: is any value | More • 3

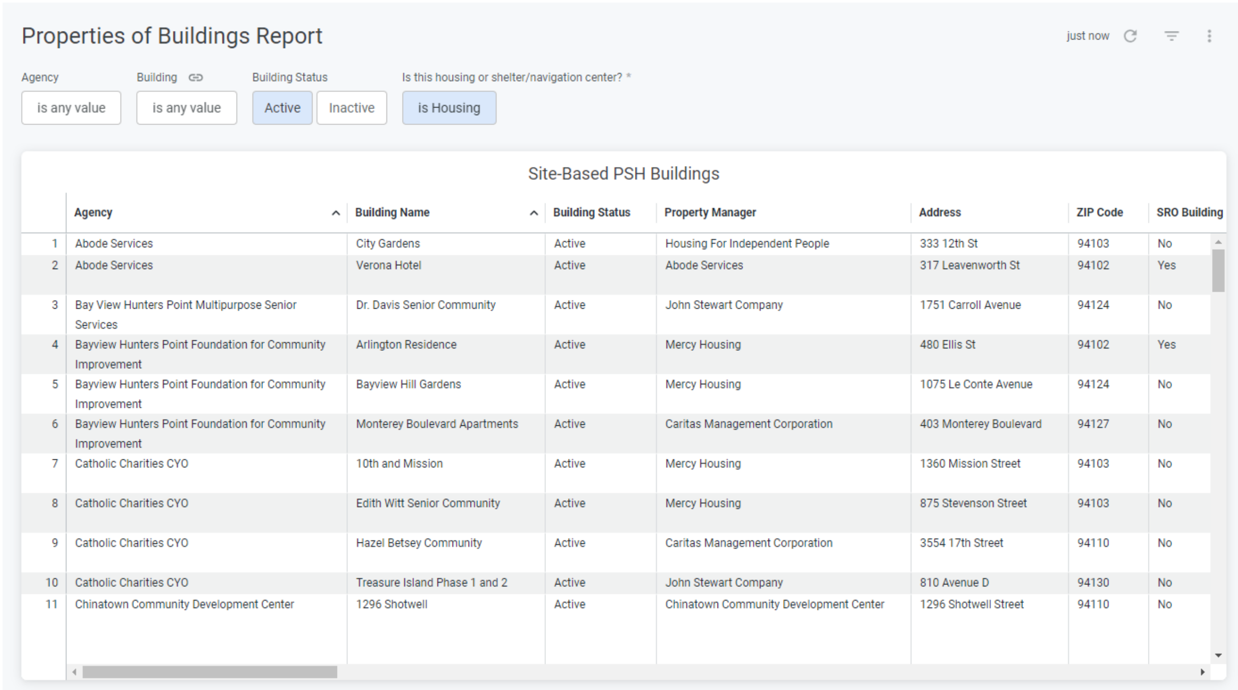
Agency Name	Program Name	Building Name	Total Unit Count	Inactive Units	Offline Units	Status Unknown Units (see report footnote)*	Reported Occupied via Offline Status	Occupied Units	Pending Occupancy Units	Available Units	Program Vacancy Rate (see report footnote)**
Abode Services	City Gardens - HUD PBV	City Gardens	50	0	0	0	0	50	0	0	0%
	City Gardens - Prop C	City Gardens	150	7	1	0	37	102	0	4	3%
	Verona - GF	Verona Hotel	65	0	1	0	0	63	0	1	3%
Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community-HUD PBV	Dr. Davis Senior Community	23	0	0	0	0	18	0	5	22%
Bayview Hunters Point Foundation for Community Improvement	Arlington Residence - CoC	Arlington Residence	21	0	0	0	0	16	0	5	24%
	Arlington Residence - HUD PBV	Arlington Residence	65	0	0	0	0	57	0	8	12%
	Arlington Residence - LOSP	Arlington Residence	67	0	1	0	19	45	0	2	4%
	Bayview Hill Gardens - CoC	Bayview Hill Gardens	17	0	0	0	0	13	0	4	24%
	Bayview Hill Gardens - HUD PBV	Bayview Hill Gardens	33	0	0	0	0	24	0	9	27%
	Bayview Hill Gardens - LOSP	Bayview Hill Gardens	22	0	0	0	0	21	0	1	5%
	Monterey Boulevard Apartments - LOSP	Monterey Boulevard Apartments	4	0	0	0	0	1	0	3	75%
Catholic Charities CYO	10th and Mission - LOSP	10th and Mission	44	0	0	0	0	41	0	3	7%
	Edith Witt Senior Community - HUD 202	Edith Witt Senior Community	16	0	0	0	0	16	0	0	0%
	Edith Witt Senior Community - LOSP	Edith Witt Senior Community	11	0	0	0	0	10	0	1	9%

2. Use the **Housing Inventory Snapshot by Property Manager** report for the same information as the Housing Inventory Snapshot, but sorted by Property Management organization rather than Support Services.

3. Once you open the Snapshot report, you can filter by Agency or Program. If you do select a filter, hit the round blue arrow button in the top right corner to refresh the report. This report shows the total unit breakdown by program and building. Check to make sure the number of units in each column is correct. You might need to end the offline status of a unit or update the unit associated with a client to ensure these numbers match.

Properties of Buildings

The **Properties of Buildings** report allows for all system fields related to building records to be displayed. Be sure to scroll to the right to see all details. It can be filtered by agency, building, or building status. Be sure to refresh the report using the **blue circular update arrow** [ ] whenever you update the filters. If there are any erroneous entries, please let your HSH program manager know as soon as possible.



Properties of Buildings Report

just now

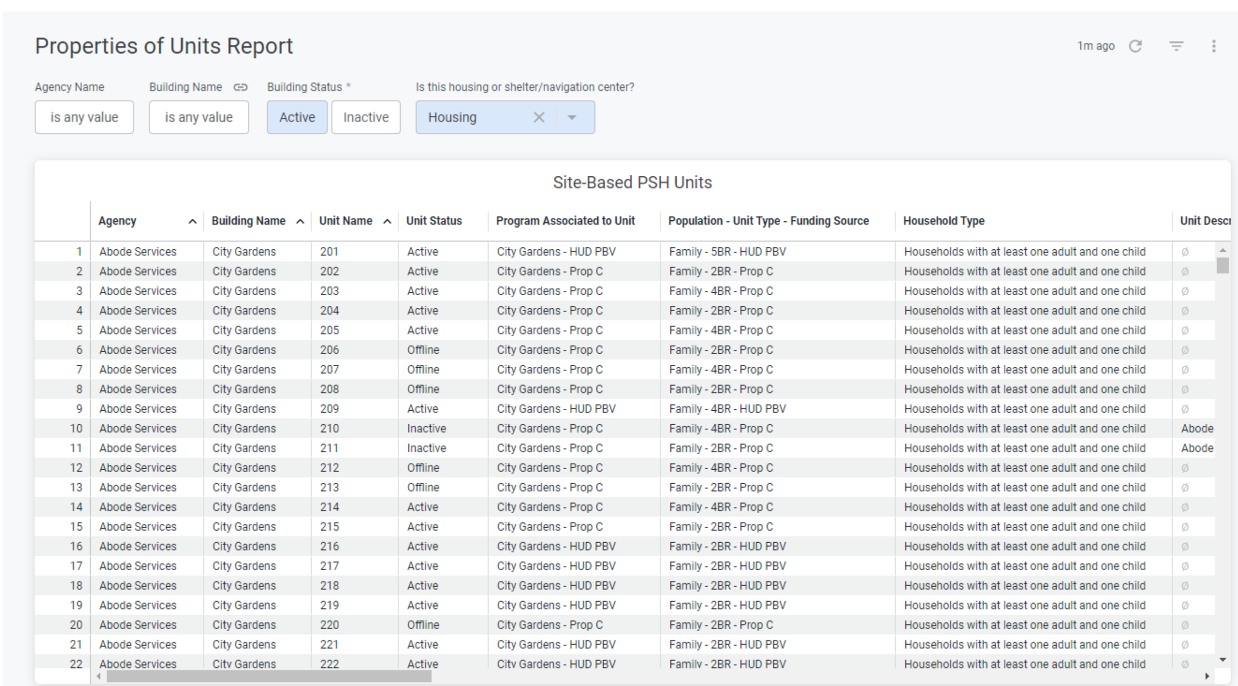
Agency: is any value | Building: is any value | Building Status: Active / Inactive | Is this housing or shelter/navigation center? *: is Housing

Site-Based PSH Buildings

	Agency	Building Name	Building Status	Property Manager	Address	ZIP Code	SRO Building
1	Abode Services	City Gardens	Active	Housing For Independent People	333 12th St	94103	No
2	Abode Services	Verona Hotel	Active	Abode Services	317 Leavenworth St	94102	Yes
3	Bay View Hunters Point Multipurpose Senior Services	Dr. Davis Senior Community	Active	John Stewart Company	1751 Carroll Avenue	94124	No
4	Bayview Hunters Point Foundation for Community Improvement	Arlington Residence	Active	Mercy Housing	480 Ellis St	94102	Yes
5	Bayview Hunters Point Foundation for Community Improvement	Bayview Hill Gardens	Active	Mercy Housing	1075 Le Conte Avenue	94124	No
6	Bayview Hunters Point Foundation for Community Improvement	Monterey Boulevard Apartments	Active	Caritas Management Corporation	403 Monterey Boulevard	94127	No
7	Catholic Charities CYO	10th and Mission	Active	Mercy Housing	1360 Mission Street	94103	No
8	Catholic Charities CYO	Edith Witt Senior Community	Active	Mercy Housing	875 Stevenson Street	94103	No
9	Catholic Charities CYO	Hazel Betsey Community	Active	Caritas Management Corporation	3554 17th Street	94110	No
10	Catholic Charities CYO	Treasure Island Phase 1 and 2	Active	John Stewart Company	810 Avenue D	94130	No
11	Chinatown Community Development Center	1296 Shotwell	Active	Chinatown Community Development Center	1296 Shotwell Street	94110	No

Properties of Units

Similar to the Properties of Buildings report, the Properties of Units report allows for all system fields related to individual unit records to be displayed. It can be filtered by agency, building, or building status. Be sure to refresh the report using the blue circular update arrow [ ] whenever you update the filters. Be sure to scroll to the right to see all details. If there are any erroneous entries, please let your HSH program manager know as soon as possible.



Properties of Units Report

1m ago

Agency Name: is any value | Building Name: is any value | Building Status *: Active / Inactive | Is this housing or shelter/navigation center?: Housing

Site-Based PSH Units

	Agency	Building Name	Unit Name	Unit Status	Program Associated to Unit	Population - Unit Type - Funding Source	Household Type	Unit Descr
1	Abode Services	City Gardens	201	Active	City Gardens - HUD PBV	Family - 5BR - HUD PBV	Households with at least one adult and one child	∅
2	Abode Services	City Gardens	202	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
3	Abode Services	City Gardens	203	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
4	Abode Services	City Gardens	204	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
5	Abode Services	City Gardens	205	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
6	Abode Services	City Gardens	206	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
7	Abode Services	City Gardens	207	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
8	Abode Services	City Gardens	208	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
9	Abode Services	City Gardens	209	Active	City Gardens - HUD PBV	Family - 4BR - HUD PBV	Households with at least one adult and one child	∅
10	Abode Services	City Gardens	210	Inactive	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	Abode
11	Abode Services	City Gardens	211	Inactive	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	Abode
12	Abode Services	City Gardens	212	Offline	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
13	Abode Services	City Gardens	213	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
14	Abode Services	City Gardens	214	Active	City Gardens - Prop C	Family - 4BR - Prop C	Households with at least one adult and one child	∅
15	Abode Services	City Gardens	215	Active	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
16	Abode Services	City Gardens	216	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
17	Abode Services	City Gardens	217	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
18	Abode Services	City Gardens	218	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
19	Abode Services	City Gardens	219	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
20	Abode Services	City Gardens	220	Offline	City Gardens - Prop C	Family - 2BR - Prop C	Households with at least one adult and one child	∅
21	Abode Services	City Gardens	221	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅
22	Abode Services	City Gardens	222	Active	City Gardens - HUD PBV	Family - 2BR - HUD PBV	Households with at least one adult and one child	∅

ONE System Report Library Quick Reference Guide

LOCATION IN REPORT LIBRARY SECTION	TITLE	CONTENT
Program Based	[GNRL-106] Program Roster	This report provides an overview of program stay information for all active, enrolled, or exited clients.
Program Based	[GNRL-220] Program Details Report	This report is based on program enrollments. Includes all client data at entry, annual assessment, or exit.
Program Based	[OUTS-106] Client Demographics	Provides client demographic details with charts for all enrolled clients for selected programs.
Program Based	[GNRL-400] Program Linked Service Review	Lists all services provided during the reporting period and a detailed listing of services linked to selected programs.
Program Based	[OUTS-720] Client Program Service	Provides a detailed listing of program-linked services by client.
Service Based	[GNRL-104] Service Summary	Provides service counts and the number of unique clients who received selected services.
Service Based	[GNRL-103] Service Census	Provides a list of clients who received specific services on specific dates.
Data Quality	[DQXX-103] Monthly Staff Report	Provides three categories of information: *General Data Quality, User Activity,* and *Data Quality by Data Element* for all clients served.
HUD Reports	[HUDX-225] HMIS Data Quality Report	Reviews data quality across a number of HMIS data elements.
Agency Management	[STFF-104] Staff Client Data Activity Report	Provides program management with a record of staff and user client record activity in the ONE System.
Agency Management	[STFF-101] User Activity Report	This report provides information regarding login dates, times, and durations.
Community and Referrals	[RFRL-120] Community Queue Detail	Provides details about clients that were referred to the Community Queue by the agencies with the same CoC as the current agency.
Community and Referrals	[RFRL-122] CE Community Queue Detail Report	This is a referral-based report that provides details about clients on Coordinated Entry queues.
Community and Referrals	[RFRL-102] Referral Outcomes Statistics	This report returns a detailed breakdown of referral outcomes by agency and program.