



# ONE System Housing Training

# Agenda

Welcome

Overview

Switching Agencies

Posting Openings

Using the Offline Vacancy Tracker

Processing Referrals

Program Enrollments & Exits

Release of Information

ONE System Refreshers



# Overview

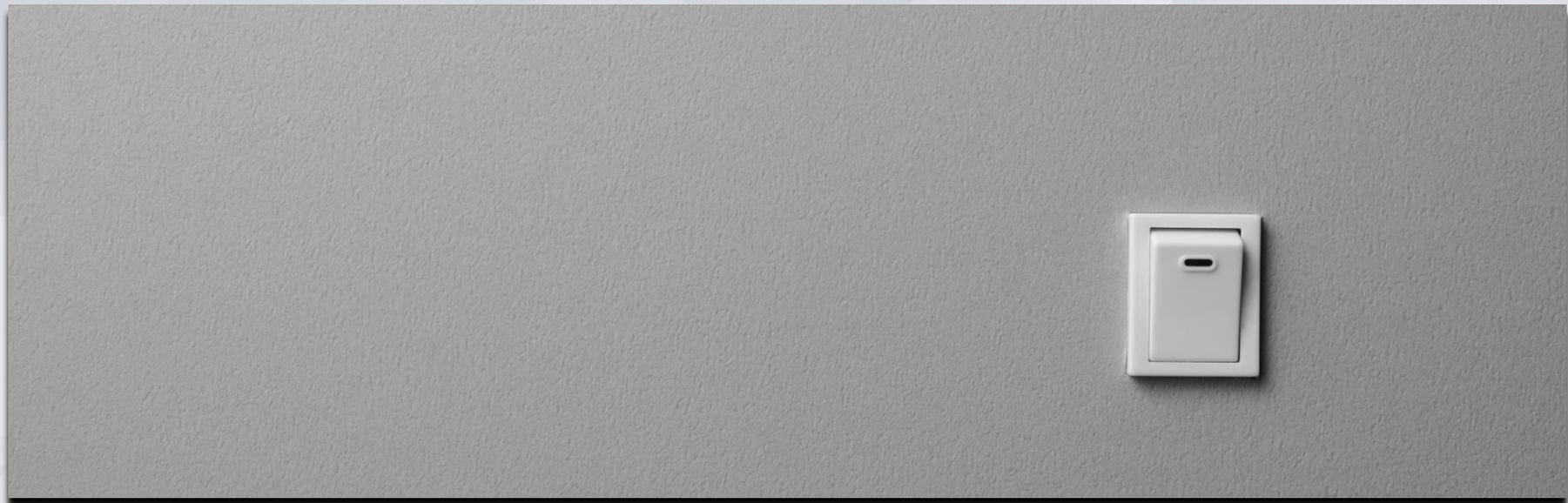
# Overview

HSH and Bitfocus have been collaborating to improve the way housing is managed in the ONE System. This effort aims to support data quality and better meet the needs of our providers.

Here is what you can expect to see:

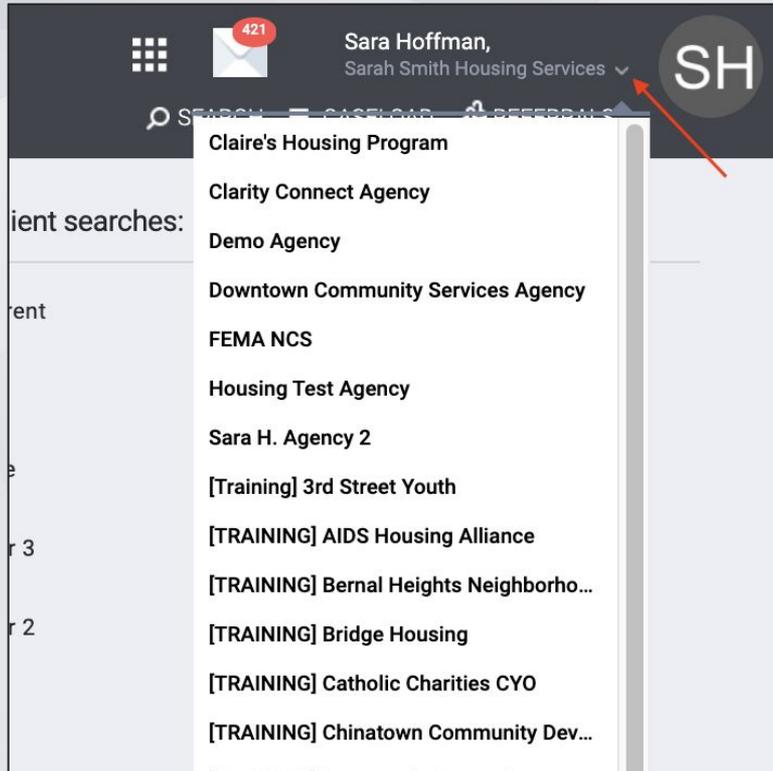
- All programs are located under the service provider agency
- Program names reflect the housing site and main funding/subsidy source
- Some housing sites have multiple programs





# Switching Agencies

# Switching Agencies



- All programs are set up under the service provider agency.
- Property managers may need to switch agencies to access programs.
- Switch agencies by clicking the dropdown arrow under you name.



# Posting Openings

# Posting Openings

Units should be posted in the ONE system when they are “Ready for Referral”.

- A unit is “Ready for Referral” when the housing provider has a confirmed date that the unit will be ready to be occupied and receive application documents.
- Typically this will be within approximately two weeks.
- For new buildings, this timeframe will be adjusted according to the agreed upon lease-up timeline so that referrals can be approved when the building is ready for occupancy.

If any unforeseen circumstances or maintenance issues that change the date the unit is ready for occupancy and arise after a referral has been matched, the housing provider is responsible for notifying the client and housing navigator immediately.

# Posting Openings

- Providers should post open unit under the *Availability Tab*.
- Make sure availability is set to *Limited Availability* and reach out to HSH if not

The screenshot displays the Providence Foundation Referrals interface. At the top, the user is identified as Sara Hoffman. The main navigation bar includes 'SEARCH', 'CASELOAD', and 'REFERRALS'. Below this, the 'REFERRALS' section is active, with a sub-menu containing 'Dashboard', 'Pending', 'Community Queue', 'Analysis', 'Completed', 'Denied', 'Set', 'Availability', and 'Open Units'. The 'Availability' tab is selected and highlighted with a red box. The main content area shows a table titled 'Program Availability' with columns for 'FULL AVAILABILITY', 'LIMITED AVAILABILITY', and 'NO AVAILABILITY'. The table lists several programs, including 'Armstrong Place Senior Housing - LOSP', 'Bethel Women's Shelter', 'covid services', 'ESG-Providence Foundation Shelter Program', 'Providence Bayview', and 'Providence Family Services Center'. The 'Providence Family Services Center' row has a red box around the 'NO AVAILABILITY' column, which contains an upward-pointing arrow icon. Below the table, there are two buttons: 'ADD SINGLE OPENING' and 'ADD MULTIPLE OPENINGS'. A message on the right side of the screen states 'There are no results'.

Program	FULL AVAILABILITY	LIMITED AVAILABILITY	NO AVAILABILITY
Armstrong Place Senior Housing - LOSP			
Bethel Women's Shelter			
covid services			
ESG-Providence Foundation Shelter Program			
Providence Bayview			
Providence Family Services Center			⬆

There are no available openings  
There are no reserved openings

[ADD SINGLE OPENING](#) [ADD MULTIPLE OPENINGS](#)

# Posting Openings

- The date should reflect that date the unit is actually available
- Characteristics that only apply to a specific unit should be listed in the notes box (i.e. this unit is dedicated to a veteran but most units in the building are not).
- Please also add the Unit # in **Additional Notes**
  - This must be completed for the Unit # to be visible in the opening after a client has been matched to the unit
- Fill out as much information as possible

626 Mission Bay - LOSP

FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY ^

There are no available openings

RESERVED OPENINGS

Opening	Client	Referred Date
04/25/2022 Unit #202	Christopher Shark Referred by: [TRAINING] San Francisco Family Coordinated Entry Agency	04/25/2022

**Unit # from Additional Notes**

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?

Does the building have stairs?

Sub-Population: Veteran

Sub-Population: Adult

Sub-Population: Youth

Sub-Population: Family

ADA Unit

HDAP



# Using the Offline Vacancy Tracker

# Offline Vacancy Tracker: The Basics

- The Offline Vacancy Tracker is the application HSH uses to track units that are not ready to receive a referral
- When an offline unit becomes ready for referral, post the unit to ONE as covered in previous slides
- “Close out” the OVT entry so the unit does not appear as a vacancy in ONE and OVT
- Closing out the vacancy is very important so we are not double-counting vacancies

Department of Homelessness and Supportive Housing (HSH) OVT Provider Dashboard  
OVT Provider Batch Referrals Dashboard  
Units Processed/Removed from Tracker

## City Wide Offline Vacancy Tracker

Hotel California

100 (TEST)	Hotel California	Unit# 100	>
58 days vacant	2BD	LOSP, FAM,	Maintenance
100 (TEST)	Hotel California	Unit# 100B	>
58 days vacant	2BD	LOSP, FAM,	Maintenance
100 (TEST)	Hotel California	Unit# 123	>
25 days vacant	1BD	CNC... Adult/VET,	18 days past due
100 (TEST)	Hotel California	Unit# 124	>
25 days vacant	1BD	CNC... Adult/VET,	14 days past due Ready for Batch ...
100 (TEST)	Hotel California	Unit# 126	>
25 days vacant	1BD	CNC... Adult/VET,	Ready for Batch ...

### Update an existing unit

Program name:  ▼

Unit number:

Status:  ▼

Move out reason:  ▼

Date of vacancy:  📅

Expected date available:  📅

Notes:

Unit size:  ▼

# Offline Vacancy Tracker: Closing Unit out of OVT

- When you post a unit to ONE that had been listed in the OVT, you will need to “close out” the unit in OVT
- Change the Status to “Ready for Referral”
- Complete the two additional fields that appear:
  - Date posted to ONE
  - 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

Department of Homelessness and Supportive Housing (HSH) OVT Provider Dashboard  
OVT Provider Batch Referrals Dashboard  
Units Processed/Removed from Tracker

## City Wide Offline Vacancy Tracker

Hotel California

100 (TEST)	Unit#	
Hotel California 58 days vacant ZBD LOSP, FAM, Maintenance	100	>
100 (TEST)		
Hotel California 58 days vacant ZBD LOSP, FAM, Maintenance	100B	>
100 (TEST)		
Hotel California 25 days vacant 1BD CNC... Adult/VET, 18 days past due	123	>
100 (TEST)		
Hotel California 25 days vacant 1BD CNC... Adult/VET, 14 days past due	124	>
100 (TEST)		
Hotel California 25 days vacant 1BD CNC... Adult/VET, Ready for Batch ...	126	>

### Update an existing unit

Program name: Hotel California  
1360 Mission

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  

ONE posting ID  

Notes

New

Clone

Delete

Update

Cancel

# Offline Vacancy Tracker: Closing Unit out of OVT

- After you enter Date posted to ONE & your name, click Update
- The unit will no longer appear in this view but it is saved in the OVT
- You can view units that were closed out or deleted by clicking “Units Processed/ Removed from Tracker” (upper right corner of screen)

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

[OVT Provider Batch Referrals Dashboard](#)  
[Units Processed/Removed from Tracker](#)

Hotel Calif

100 (TEST) Hotel California 37 days vacant Studio LOSP, Sr. 62+, Janitorial	14 days past due Unit# 1-A...	>
100 (TEST) Hotel California 210 days vacant	145 days past due Unit# 100 Missing for Referral	>
100 (TEST) Hotel California 28 days vacant SRQ	Unit# 120 Sr. 62+, VET, Pest Control	>

Update an existing unit

Program name: Hotel California  
1360 Mission

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 <sup>1</sup> Clear: 5/20/2022

ONE posting ID: Lehua Asher

Notes:

[New](#)  
[Clone](#)  
[Delete](#)  
[Update](#)  
[Cancel](#)

# Offline Vacancy Tracker: Recently Closed Units

 Processed Units - Posted To ONE and Transfer Completed Units City Wide Offline Vacancy Tracker <span style="float: right;">Back</span>								
Property		Unit		Status		Date Post to ...		ONE Post ID
100 (TEST)		Hotel California						
Property	Unit	Processed	Status	Date Post to ...	ONE Post ID	Transfer C...	Deleted	Move-In ...
Hotel California	100	Yes	Ready for Referral	5/20/2022	Lehua Asher			
Hotel California	123	Yes	Temp Occupied				9/8/2022	
Hotel California	123	Yes	Ready for Referral	9/30/2022	Valerie Okelola			
Hotel California	125	Yes	Batch Move-In					10/5/2022
Hotel California	401	Yes	Ready for Referral	8/16/2022	Valerie Okelola			
Hotel California	ABC	Yes	Batch Withdrawn					

The “Units Processed/ Removed from Tracker” section retains the details for all units closed out or deleted from OVT



# Processing Referrals

# Processing Referrals: Referral Notifications

- Automatic notifications can setup via email and Clarity Inbox when a referral has been sent to their program.
- **Housing Providers need to make sure the appropriate staff are set-up to receive notifications. You can also include Service Providers to be included in notifications.**
- Agency Leads should contact the Bitfocus Helpdesk at [onesf@bitfocus.com](mailto:onesf@bitfocus.com) or 415.429.4211 to make any changes.



# Processing Referrals: Referral Notifications

[TRAINING] Providence Foundation



SSCR Test,  
[TRAINING] Providence Foundation

ST

SEARCH CASELOAD

INBOX: MESSAGE

AA

Admin Admin @ [TRAINING] System

To SSCR Test Dec 16, 2021 at 12:26 PM

Dear SSCR Test,

This client has been referred to a program.

Please follow [this link](#) to view the new pending referral.

San Francisco Training System Team



New Referral on San Francisco Training System Inbox x

San Francisco Training System [noreply@bitfocus.com](mailto:noreply@bitfocus.com) via [amazonses.com](https://amazonses.com)  
to me

12:10 PM (11 minutes ago) ☆



Dear Andrea Banas,

[This client](#) has been referred to a program.

Please follow [this link](#) to view the new pending referral.

San Francisco Training System Team

Questions? Visit our online wiki: [get.clarityhs.help](https://get.clarityhs.help)

# Processing Referrals: The Pending Referrals Tab

- Click the *Referrals Button* at the top right of the screen.
- Click the *Pending Tab*.
- Select the client by clicking the edit box to the left of the client's name.

The screenshot displays the user interface for 'Sara's Test Agency'. At the top right, the 'REFERRALS' button is highlighted with a red arrow and the number 1. Below it, the 'Pending' tab is selected, also indicated by a red arrow and the number 1. In the 'Pending Referrals' section, a table lists two clients. The first client, 'Apple Pie', has an edit icon (a trash can with a pencil) to its left, which is highlighted with a red arrow and the number 2. The table columns are 'Referral Date', 'Qualified', and 'Days Pending'. The first row shows a referral on 12/19/2018, 'Reassigned' status, and '7 total' / '7 pending' days. The second row shows a referral on 12/26/2018, 'Reassigned' status, and '0 total' / '0 pending' days.

Client	Referral Date	Qualified	Days Pending
Apple Pie Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	7 total 7 pending
Apple Pie Program: Blue Sky RRH Referred by: Sara's Test Agency	12/26/2018	Reassigned	0 total 0 pending

# Processing Referrals: Pending-In Process

- Change the Status from Pending to Pending-In Process.
  - The status should be changed within a day or two of receiving the referral.
- This will notify the Access Point that the referral is received.
- This does not mean the client is enrolled in the program.

[TRAINING] Always Awesome Agency

Dashboard Pending Community Queue Analysis Completed Denied Sent Availability

REFERRAL: EDIT

Client	Raz Berry
Referred Program	Excellent Program
Referred Program Opening	01/29/2018 74. 2br apt ADA accessible
Referred to Agency	[TRAINING] Always Awesome Agency
Referring Agency	[TRAINING] Bayview Access Point
Referred Date	01/28/2018 11:27 PM
Days Pending	199 day(s)
Qualified	Reassigned
Fam Priority score	66
Referred by Staff	Janel Fletcher
Case Manager	Select
Last Activity	01/28/2018 CHECK-IN
Status	<input checked="" type="checkbox"/> Pending <input type="checkbox"/> Pending - In Process <input type="checkbox"/> Denied <input type="checkbox"/> Expired
Private	

SAVE CHANGES CANCEL

# Processing Referrals: Pending-In Process

- The color of the referral changes to green when status is changed.
- You will receive an "In- Process notification every 14 days if status isn't changed.

Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

## Pending Referrals

Search

Mode Standard

Eligible Clients Only

Sort By Default

Client	Referral Date	Qualified	Days Pending
<b>Apple Pie</b> Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	21 total 21 pending 0 in process
<b>Apple Pie</b> Program: Blue Sky RRH Referred by: Sara's Test Agency	12/26/2018	Reassigned	14 total 14 pending

# Processing Referrals: Denying a Referral

- Change the status of the referral to denied
- Four additional fields will populate that need to be answered
- **Send to Community Queue:** Answer yes if client is still experiencing homelessness
- **Denied by type:** Provider/client
- **Denied Reason:** Reason for the denial
- **Denial Information:** Provide additional details explaining the reason for the denial

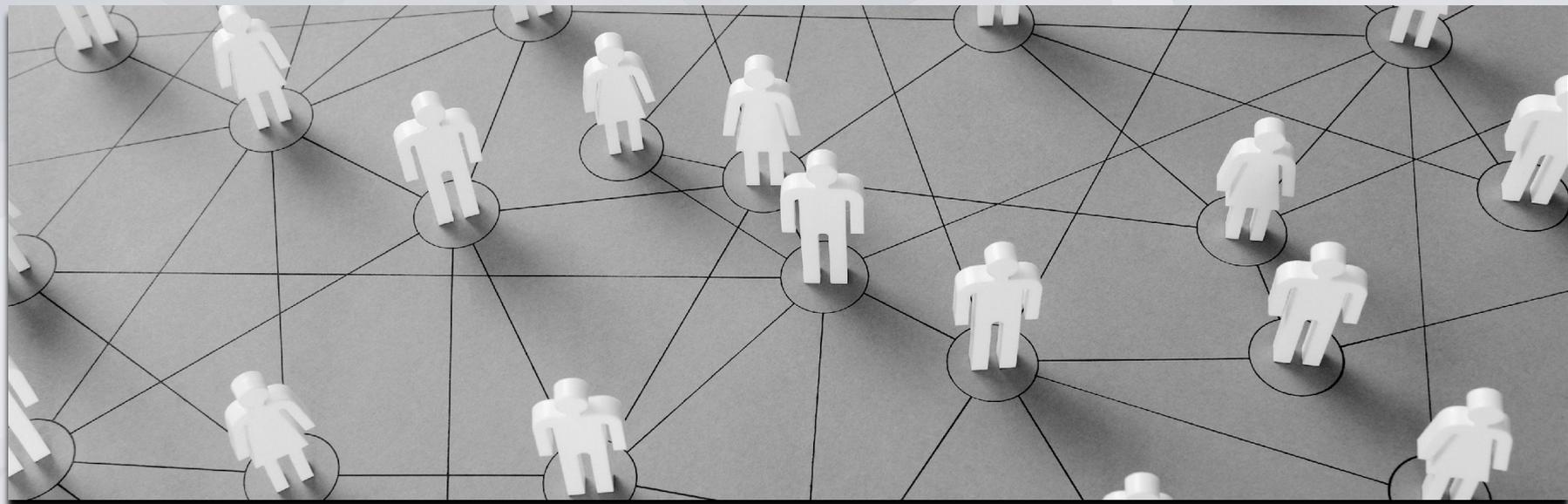
The screenshot shows a web form for denying a referral. The form is titled "Denying a Referral" and is part of a "Processing Referrals" workflow. The form includes the following fields and controls:

- Status:** A dropdown menu set to "Denied".
- Send to Community Queue:** A dropdown menu with "-- Select --" as the current selection.
- Denied By Type:** A dropdown menu with "-- Select --" as the current selection.
- Denied Reason:** A dropdown menu with "Select" as the current selection.
- Denial Information:** A text input field for providing additional details.
- Private:** A toggle switch currently turned off.
- Buttons:** "SAVE CHANGES" and "CANCEL" buttons.

A red box highlights the "Send to Community Queue", "Denied By Type", "Denied Reason", and "Denial Information" fields, indicating that these four fields will populate and need to be answered when a referral is denied.

# Processing Referrals: Referral Notifications

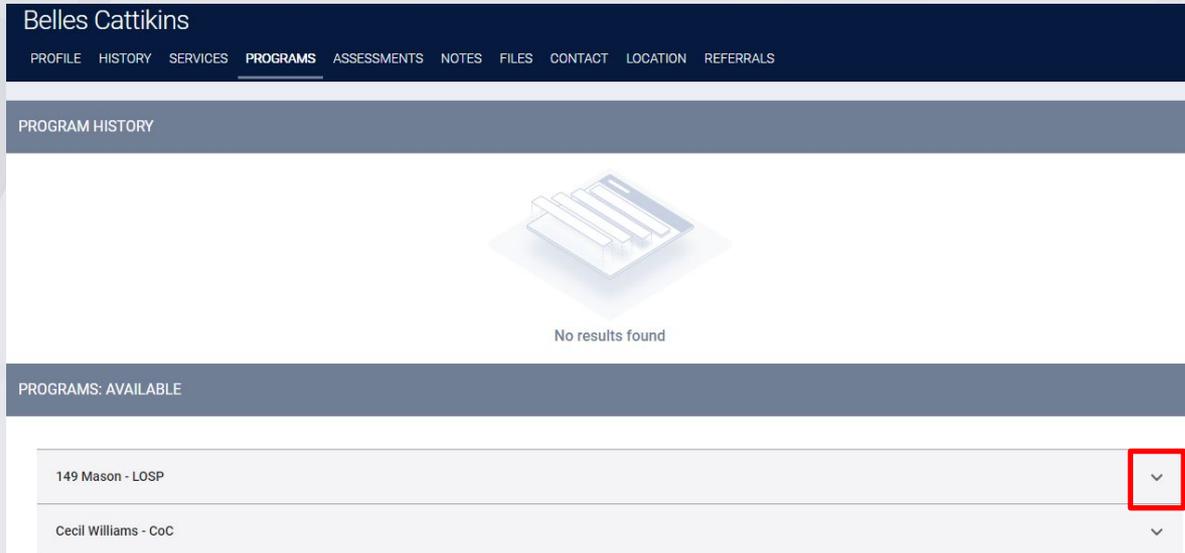
Referral Status	Max Timeframe	System Action
Pending Notification	7 days	If the status of the referral stays in pending status for 7 days or more, the provider will receive weekly notifications until the status is changed
Pending-in Process Notification	14 days	If the status of the referral stays in pending-in process status for 14 days or more, the provider will receive weekly notifications until the status is changed
Community Referral Threshold	180 days	If the referral status isn't changed for more than 180 days, the referral will expires and the client will be sent back to the queue.



# Accepting Referrals/Enrollments & Exits

# Enrolling Clients in to a Program

- Accepting the referral enrolls the client and closes the referral simultaneously
- Click “Programs” tab from the client profile
- Under Programs: Available section, click the down arrow of the correct program



The screenshot displays a web interface for a client named Belles Cattikins. At the top, a dark blue navigation bar contains the client's name and several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (which is underlined), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this bar is a section titled 'PROGRAM HISTORY' with a light blue header. The main content area of this section is white and contains a 3D icon of a calendar and the text 'No results found'. Below the 'PROGRAM HISTORY' section is another section titled 'PROGRAMS: AVAILABLE' with a light blue header. This section contains a list of two programs: '149 Mason - LOSP' and 'Cecil Williams - CoC'. Each program entry has a small downward-pointing arrow icon to its right. The arrow for '149 Mason - LOSP' is highlighted with a red square.

PROGRAMS: AVAILABLE	
149 Mason - LOSP	▼
Cecil Williams - CoC	▼

# Enrolling Clients in to a Program

- The “Program placement a result of Referral...” toggle must be on to close the referral.
- The orange pending referral box is a visual to let you know your are enrolling in the right program.

The screenshot displays a program enrollment interface with the following components:

- Client and Unit Summary:** Two circular gauges show 3 CLIENTS and 3 UNITS. The client gauge is divided into 0% Families (red) and 100% Individuals (blue). The unit gauge is divided into 10% Checked in (red), 0% Reserved (blue), and 90% Available (grey).
- Funding Source:** HUD.CoC – Permanent Supportive Housing.
- Service Categories:** Housing (checked), Housing Search and Placement (checked), Case Management (checked).
- Availability:** Limited Availability.
- PROGRAM AVAILABILITY:** Available openings: 2.
- HOUSING AVAILABILITY:** Households without children: 30 Beds in 30 Units.
- Program Placement:** A toggle switch is turned on, labeled "Program Placement a result of Referral provided by SFHOT Practice Agency".
- Include group members:** Two toggle switches are turned off: "First Last" and "Castro Valley".
- Pending Referral:** An orange box indicates "1 pending referral(s), Oldest 116 days".
- DOC REQUIREMENTS:** A section at the bottom with an "ENROLL" button.

# Enrolling Clients in to a Program

- Please make sure to collect as much information as possible.
- For PSH, Housing Move-In Date and Program Date should both reflect the housing move-in date.
- Avoid using “Client refused” or “Data Not Collected” whenever possible.
- Data entry should happen within three working days.

Enroll '455 Fell- LOSP' program for client Lucia Sunnies

Program Date	04/13/2022	
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT		
Housing Move-In Date	04/13/2022	
PRIOR LIVING SITUATION		
Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu...	
Length of Stay in Prior Living Situation	90 days or more, but less than one year	
Approximate Date Homelessness Started	06/01/2020	
Number of times on the streets, in ES, or Safe Haven in the past three years	Three Times	
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Five Months	
LIFETIME LENGTH OF HOMELESSNESS IN SF		
Have you ever been homeless in SF?	No	
LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF		
Have you ever been homeless outside of San Francisco?	No	
Last Permanent Zipcode		
Quality of Zip Code	Select	

The chain link icon indicated that the enrollment is linked to a referral and was completed properly.

- Indicates the enrollment was completed properly.
- Please connect with HSH if this is missing
- The Bitfocus Help Desk can support with linking this enrollment to the referral

**Bruce Spruce**

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

**HISTORY**

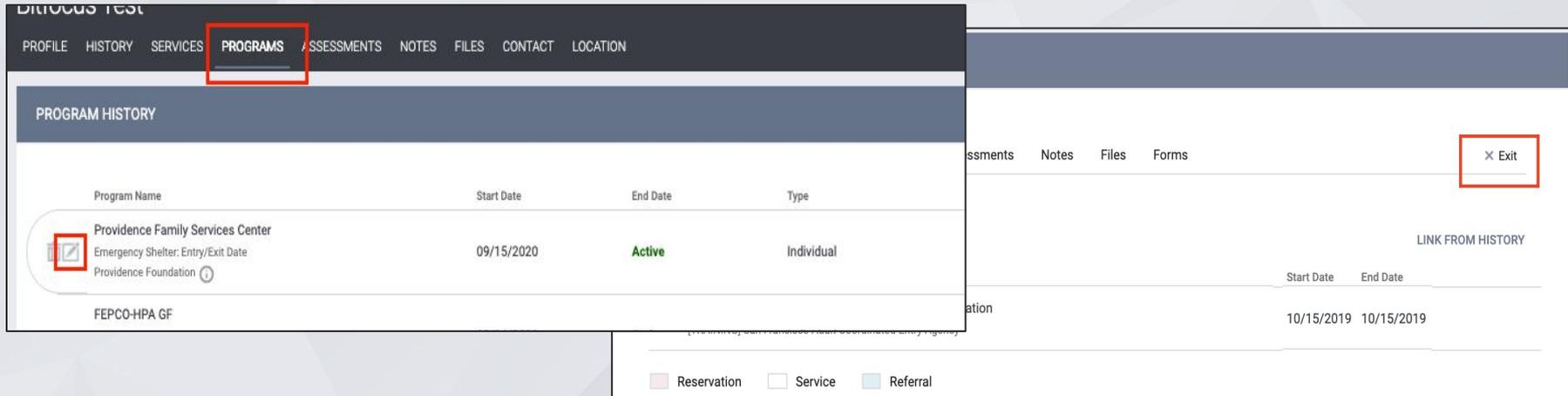
Advanced Search Options [View](#) 

Service Name	Start Date	End Date	
<b>Referral:</b> Denali Transitional Housing Gartner Agency referral to Gartner Agency 	06/22/2020	06/22/2020	
Denali Transitional Housing Gartner Agency 	06/22/2020	<b>Active</b>	

# Exiting Clients from a Program

Exits should be entered when a client is no longer receiving services from the program.

- Be sure to include an exit destination for the client.
  - You will complete an exit for all household members.
- 
- Data entry should happen within three working days.



The screenshot displays a web application interface for managing client programs. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. Below the navigation bar is the PROGRAM HISTORY section, which contains a table with the following data:

Program Name	Start Date	End Date	Type
Providence Family Services Center Emergency Shelter: Entry/Exit Date Providence Foundation ⓘ	09/15/2020	Active	Individual

Below the table, there is a legend with three categories: Reservation (pink square), Service (white square), and Referral (blue square). On the right side of the interface, there is a button labeled 'X Exit' (highlighted with a red box) and a 'LINK FROM HISTORY' section with a table showing dates: Start Date (10/15/2019) and End Date (10/15/2019).



# Transfers, Enrollments and Exits

# Transfers: Enroll into Housing Program

Enroll client into new Housing Program

↳ Under Prior Living Situation indicate Type of Residence select **Permanent housing (other than RRH) for formerly homeless persons.**

Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response)	▼
Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response)	▼
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT		
Housing Move-In Date	09/01/2000	
PRIOR LIVING SITUATION		
Type of Residence	Permanent housing (other than RRH) for formerly homeless persons	▼
Length of Stay in Prior Living Situation	One month or more, but less than 90 days	▼
Length of Stay Less Than 7 Nights	Select	▼
LIFETIME LENGTH OF HOMELESSNESS IN SF		
Have you ever been homeless in SF?	No	▼
LIFETIME LENGTH OF HOMELESSNESS OUTSIDE OF SF		
Have you ever been homeless outside of San Francisco?	No	▼
Last Permanent Zipcode	94102	
Quality of Zip Code	Full or Partial Zip Code Reported	▼
DISABLING CONDITIONS AND BARRIERS		

# Transfers: Exits from Current Housing Program

Exit from Current Housing Program



Under Destination select **Permanent housing (other than RRH) for formerly homeless persons**

End Program for client Bitfocus Test

Project Exit Date	10/06/2020	
Destination	Permanent housing (other than RRH) for formerly homeless persons	
Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response)	

**DISABLING CONDITIONS AND BARRIERS**

Physical Disability	Yes	Long Term	Yes
Developmental Disability	No		
Chronic Health Condition	No		
HIV - AIDS	Yes		
Mental Health Problem	No		
Substance Abuse Problem	No		

**MONTHLY INCOME AND SOURCES**

Income from Any Source	Yes
------------------------	-----

# Creating New Profiles

# Creating New Profiles - Searching for Clients in ONE

- Search for client
  - Search by name , partial name, DOB and SSN
- If unable to find, create a new profile

SEARCH FOR A CLIENT ADD CLIENT +

**Search by name, partial name, DOB or SSN** SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Managed with Clarity Human Services Recover deleted data

# Creating New Profiles

- Please make sure to collect as much information as possible, and avoid using “Client refused” or “Data Not Collected” whenever possible
- For existing profiles, confirm that all information is correct
- If in a family, profiles must be created for all members of a household

SEARCH FOR A CLIENT

ADD CLIENT 

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Gender

Race

Ethnicity

Please fill in Release of Information form

CANCEL



# Release of Information

# Release of Information

ONE will prompt you to have the client sign a Release of Information or give verbal consent.

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

### RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	01/07/2021	
End Date	01/07/2024	
Documentation	<div><p>✓ Select</p><p>Electronic Signature</p><p>Verbal Consent</p></div>	

### ELECTRONIC SIGNATURE FORM

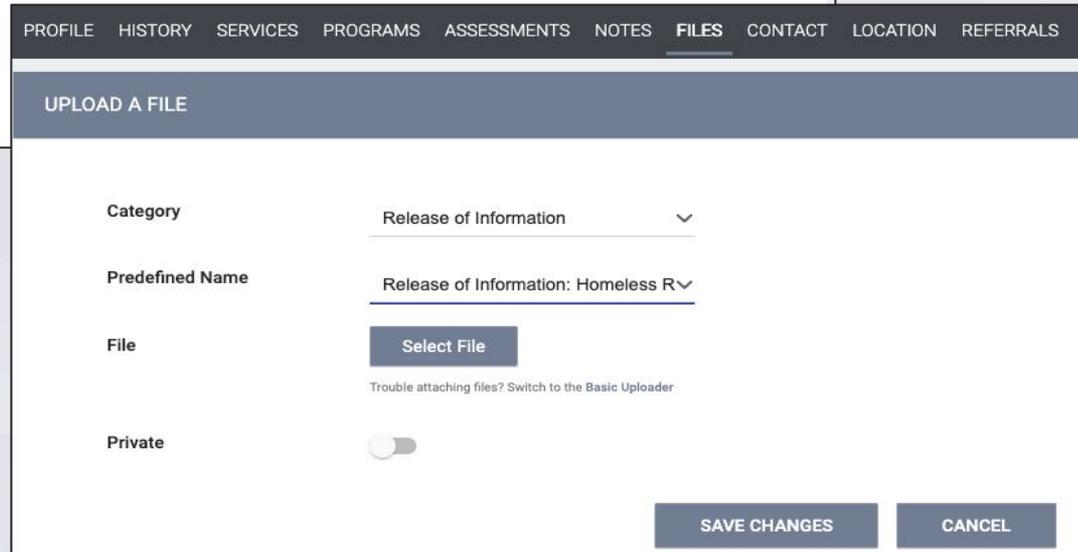
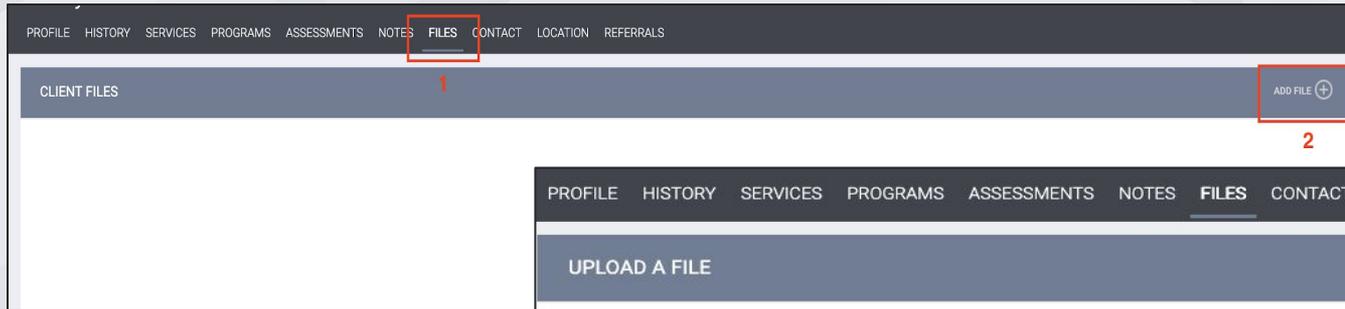
**By completing this form, you are certifying the client:**

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

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

# Uploading ROIs

- To upload an ROI, select the files tab
- Select the category for Release of Information



A screenshot of the 'UPLOAD A FILE' form. The form has a dark blue header with the text 'UPLOAD A FILE'. Below the header, there are four fields: 'Category' with a dropdown menu showing 'Release of Information', 'Predefined Name' with a dropdown menu showing 'Release of Information: Homeless R', 'File' with a 'Select File' button, and 'Private' with a toggle switch. At the bottom right, there are two buttons: 'SAVE CHANGES' and 'CANCEL'. A small text link below the 'File' field reads 'Trouble attaching files? Switch to the Basic Uploader'.



# ONE SYSTEM REFRESHERS!



# Contact Information

# Contact Information

- Contact information should be updated or entered for every client and can be entered at any time, even prior to program enrollment.
- It can be viewed by anyone accessing the client's profile.
- Contact information that is no longer valid should be marked inactive.

Ginny West Coast

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

CLIENT CONTACTS ADD CONTACT +

Contact Type	Name	Phone	Email	Date
 Client	Ginny West Coast	111-111-1111	ginny.test@test.com	01/14/2021



# Uploading Documents

# Uploading Files & Documents

From the client profile:

Files

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

Magnolia Flower

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

CLIENT FILES **ADD FILE +**

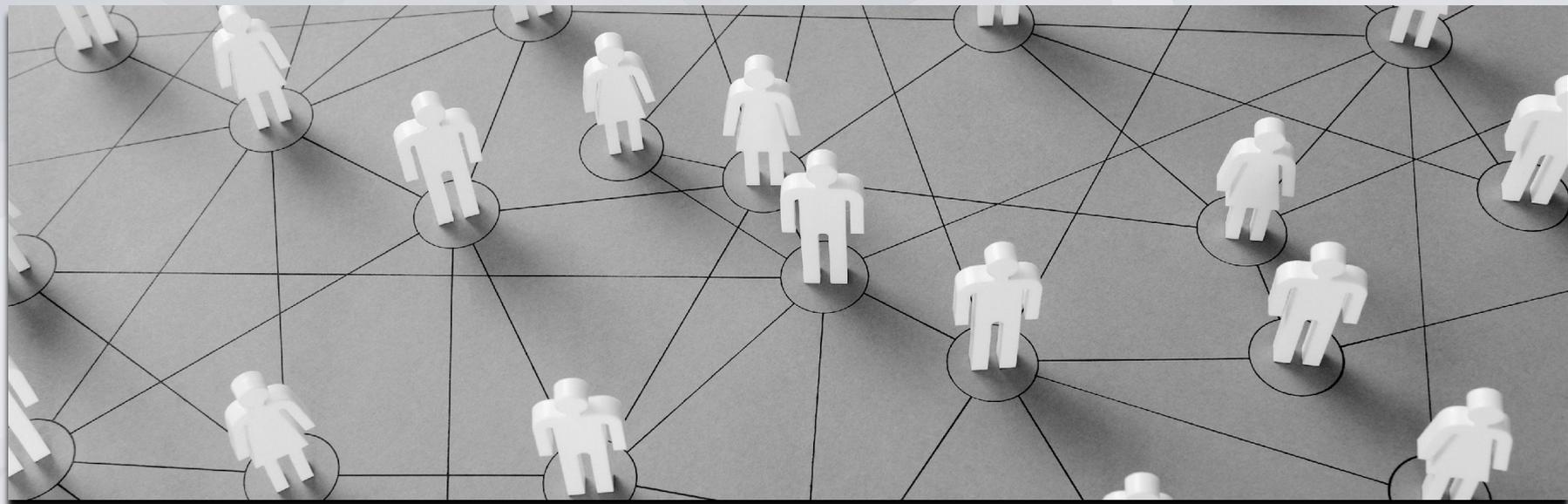
No results found

*Note: Access to files is determined by access roles*

# Uploading Files & Documents

## File Type Categories

- ✓ CalWorks HSP Documents
  - CoC Application Package
  - CoC: Housing placement, transfer, and exit documents
  - Family, Social, and Legal
  - Finances and Income
  - Fiscal Agent
  - Health and Medical
  - Homelessness Prevention Assistance Providers
  - Housing Ladder Application
  - Housing Location Assistance
  - HUD Waiver
  - Other
  - Personal Identification
  - Problem Solving
  - Rehousing Documents
  - Release of Information
  - SFHA Master Application



# Managing Households

# Managing Households

If the family composition changes, you may need to add or remove family members

- Each family member needs to have a record created before you can add the household members together
- Household must be combined as a household level in order to be included in an enrollment.

The screenshot displays a software interface for managing households, divided into three main sections:

- Left Panel:** Features a search bar and a 'CASELOAD' menu. Below are icons for a printer, calendar, and shield. A 'Household Members' section contains a 'Manage' button, which is highlighted with a red arrow. Below this is a list of household members: 'Springtime Flowerchild' (Daughter). An 'Active Programs' section is also visible.
- Middle Panel:** Titled 'Household Members', it shows a list of members: 'Spring Flowers' (Mother ★) and 'Springtime Flowerchild' (Daughter). A red arrow points to a pencil icon next to the 'Daughter' entry.
- Right Panel:** Titled 'EDIT GLOBAL HOUSEHOLD', it contains a form with the following fields:
  - Member Type: Daughter (dropdown)
  - Head of Household: Spring Flowers (dropdown)
  - Joined Household: 06/17/2019 (calendar icon)
  - Exited Household:  (toggle switch, highlighted with a red box)
  - Enter Date: / / (calendar icon)
  - SAVE button



# Services

# Services

- Services are recorded to capture engagement with a client.
- Services should be entered within the program enrollment.
- Select the applicable service by clicking the drop down to the right of the service.

PROGRAM: COMPASS FAMILY SHELTER

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

### Services

Bed Night Services- ES	Housing 
Denial of Service:	Other 
Denial of Service: Arbitration Scheduled	Other 
Denial of Service: Hearing Outcome	Other 
Document Ready	Housing Search and Placement 
ESG Family Shelter ISP Complete	No Category 

# Services

- Some services may have service items you can choose from.
- Select the most appropriate service items by clicking on the drop down to the right.

The screenshot shows a web form titled "Refused Housing Referral" with a sub-header "Housing Search and Placement" and a dropdown arrow. The form contains a list of eight refusal reasons, each with a dropdown arrow to its right. A red rectangular box highlights the entire column of dropdown arrows.

Refusal Reason	Action
Observed Mental Health Barrier	▼
Other Refusal Reason	▼
Prefer a Different Building	▼
Prefer a Different Neighborhood	▼
Refused Participation in Mandated Payee Service	▼
Refused to Pay Required AMI Income	▼
Unable to independently look for housing due to mental/medical health need (for RRH offers)	▼
Unknown Refusal Reason	▼

# Changing Assigned Staff

In the client profile:

↳ Programs

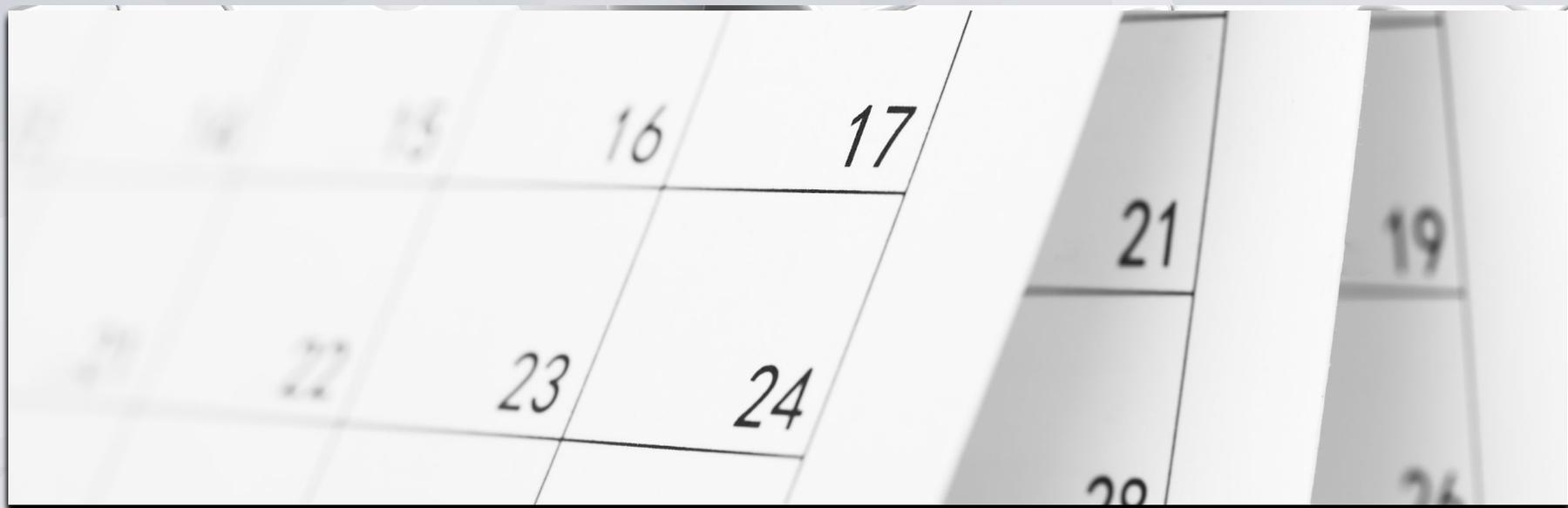
↳ Assigned Staff

↳ Select the edit icon

↳ Use the drop-down to select staff

REMEMBER TO SAVE

The screenshot shows a client profile interface with a dark navigation bar at the top containing the following tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the navigation bar, a blue header displays 'PROGRAM: TEST MH PROGRAM AB'. A secondary navigation bar includes 'Enrollment', 'History' (highlighted with a red box), 'Provide Services', 'Assessments', 'Goals', 'Notes', 'Files', and 'Forms'. The main content area features a green banner for '5 DAYS ACTIVE PROGRAM'. Below this, a form displays program details: 'Program Type: Individual', 'Program Start Date: 09/30/2020', 'Assigned Staff: Andrea Bañas' (with a red box around the text and a red arrow pointing to an edit icon), and 'Head of Household: CH'. A modal window titled 'CHANGE ASSIGNED STAFF' is open, showing a 'Make Program Private' toggle switch, a dropdown menu with 'Andrea Bañas' selected (indicated by a red arrow), and two buttons at the bottom: 'SAVE CHANGES' (highlighted with a red box) and 'CANCEL'.



# Annual & Status Assessments

# Annual & Status Assessments

Add an annual assessment every year within +/- 30 days of enrollment anniversary.

Status assessments are completed if there is a significant change in the client's living situation between annual assessments.

1. Programs tab
2. Open the program enrollment
3. Add Status Assessment
4. Choose Annual or Status
5. Fill out the screen and save

PROGRAM: BRINGING FAMILIES HOME

Enrollment History Notes Files Forms × Exit

Program Service History

There are no results to display

signed with Clarity Human Services

**2 DAYS ACTIVE PROGRAM**

Program Type: Group (2)  
Program Start Date: 08/07/2018  
Assigned Staff: Alison Wils  
Head of Household: Jane Test

Program Group Members

Luke Test 08/07/18 **Active**

Status Assessments +

No statuses

ADD PROGRAM ASSESSMENT ×

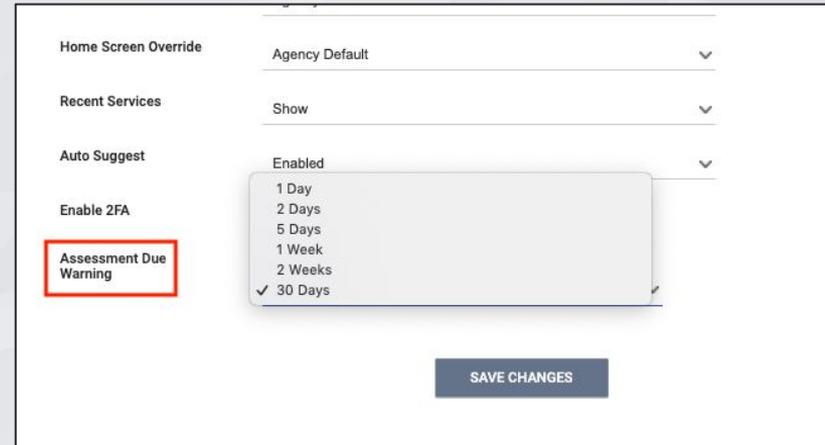
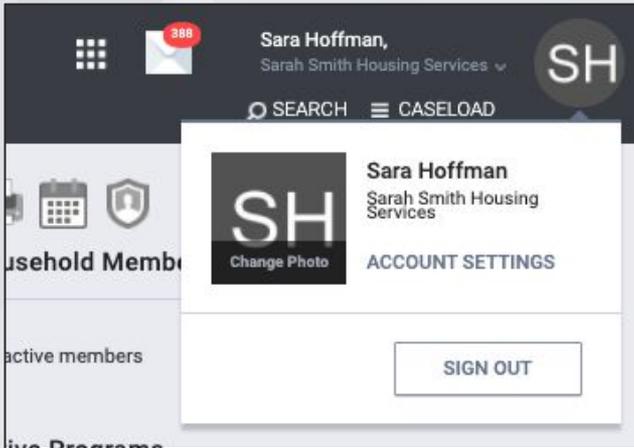
Jane Test Mother  
 Luke Test Son

ADD STATUS ASSESSMENT ADD ANNUAL ASSESSMENT

# Assessment Warnings

- Staff can set assessment warnings that will notify them close to when a client's assessment is due.
- Timelines can be set between 1-30 days.
- Warnings can be set up in 2 places.

## Under Account Settings



# Assessment Warnings

Within the program enrollment screen:

You can edit your notifications for Annual Assessments by selecting the "Edit Icon".

The screenshot displays a program enrollment interface. At the top, a green banner shows '368 DAYS ACTIVE PROGRAM'. Below this, a table lists program details: Program Type (Individual), Program Start Date (09/29/2019), Assigned Staff (Sara Hoffman), and Head of Household (Rosemary Rob). The 'Head of Household' entry has a small square icon to its right. Underneath, a section titled 'Program Group Members' indicates 'No active members'. The 'Status Assessments' section, marked with a plus icon, contains a red-bordered box with the text 'Assessment Due - September 29th 2020'. Below this, it states 'No statuses'. At the bottom, the text 'Assessment due every year' is followed by 'Notification: ON' and a square icon with a checkmark. A red arrow points to this icon.

Program Type:	Individual
Program Start Date:	09/29/2019
Assigned Staff:	Sara Hoffman
Head of Household:	Rosemary Rob <input type="checkbox"/>

### Program Group Members

No active members

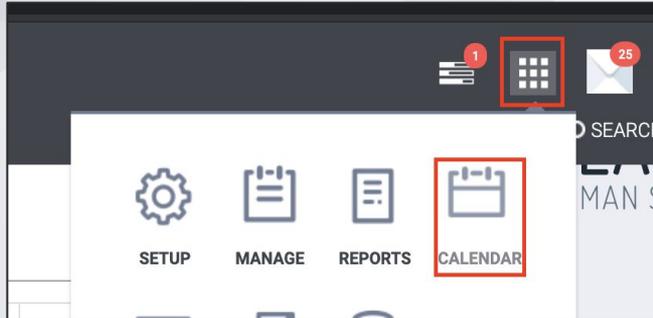
### Status Assessments

**Assessment Due - September 29th 2020**

No statuses

Assessment due every year  
Notification: **ON**

# Assessment Warnings



- ← Select the Launch Pad
- ← Select the Calendar Icon

Upcoming assessments will also generate an item in the ONE System calendar

A screenshot of the ONE System calendar for July 2021. The calendar is displayed in a month view. The days of the week are labeled: SUN, MON, TUE, WED, THU, FRI, SAT. The dates are 27, 28, 29, 30, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10. An assessment due date is highlighted in a dark blue box on Thursday, July 1st. The text in the box reads: "Awesome RRH Assessment Due Date for FD9B61683".

July 2021						
Month Week Day						
SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	1 Awesome RRH Assessment Due Date for FD9B61683	2	3
4	5	6	7	8	9	10



# Reports

# Referral Statistics Report

## [RFRL-103] Referral Statistics - Inbound

(Community and Referral Reports)

- Who's been referred to your agency
- Number of referrals received by an agency
- Status of referrals

Referral Statistics - Inbound		Demo Agency				
		Date Range: 12/01/2019 and 11/30/2020				
A direct referral is when a client is referred directly to a program regardless of eligibility criteria. Direct referrals are made from the eligibility determination screen of the client's referral tab or from the referrals tab without going to the eligibility screen.						
	Direct	CQ	Total			
Number of Agency referrals received	0	10	10			
<b>Pending Referrals</b>						
Number of pending referrals	0	0	0			
Oldest pending referral in days	0	0	0			
Newest pending referral in days	0	0	0			
Average pending referral in days	0	0	0			
<b>Pending - In Process Referrals</b>						
Number of pending in process referrals	0	1	1			
Oldest pending in process referral in days	0	61	61			
Newest pending in process referral in days	0	61	61			
Average pending in process referral in days	0	61	61			
<b>Completed Referrals</b>						
Number of referrals resulting in Program enrollment	0	6	6			
Longest time						
Shortest time						
Average time						
<b>Expired Referrals</b>						
Number of expired referrals						
Longest time						
Shortest time						
Average time						
<b>Denied Referrals</b>						
Number of denied referrals						
Longest time						
Shortest time						
Average time						
<b>Breakdown of Referred to Programs</b>						
NOTE: P - Pending; P / I - Pending - In process; A - Accepted; D - Denied; E - Expired.						
<b>Emergency Shelter</b>						
Agency Name	Program Name	P	P / I	A	D	E
Demo Agency	Evergreen Family Individual Room Shelter	0	0	1	0	1
<b>Transitional Housing</b>						
Agency Name	Program Name	P	P / I	A	D	E
Demo Agency	Denali Transitional Housing	0	0	1	1	0
<b>PH - Permanent Supportive Housing (disability required)</b>						
Agency Name	Program Name	P	P / I	A	D	E
Demo Agency	Zion Housing	0	1	4	1	0

# Program Roster

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

- Who's stayed in the program
- Lists program stay information for clients with the selected status in the selected program

Program Roster Report										Demo Agency			
										Active within [12/01/2019 - 11/30/2020]			
Housing Move-in: Undefined = Unknown HoH or Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes													
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	
<b>Program: Arches Navigation Center</b>													
Fever, Cedar	F32DE8A0A	11/30/1999	20	21	01/21/2020	-	0		0	0	0	S. Hoffman	
												Number of Clients: 1	
												Number of Households: 1	
<b>Program: Coordinated Entry Access Point</b>													
Canyon, Bryce	AAFEF1344	09/12/1979	40	41	01/02/2020	-	334		0	0	0	S. Hoffman	
												Number of Clients: 1	
												Number of Households: 1	
<b>Program: Street Outreach Program</b>													
Bend, Big	FBD52A648	10/07/1976	42	44	12/29/2018	-	703		0	0	0	S. Hoffman	
Jonez, Maroon	F3670B32B	01/12/1965	55	55	02/06/2020	-	299		0	0	0	S. Jones*	
												Number of Clients: 2	
												Number of Households: 2	
<b>Program: Zion Housing</b>													
Mouse, Malia	33347CB86	01/02/2018	1	2	02/01/2019	-	669	undefined	0	0	0	S. Jones*	
Mouse, Minnie	471CA3370	01/25/1985	33	35	11/11/2018	-	751	11/11/2018	0	1	0	S. Jones*	
Tree, Pine	61F0D4B00	06/04/2011	9	9	06/25/2020	-	159	undefined	0	0	0	S. Hoffman	
Canyon, Bryce	AAFEF1344	09/12/1979	41	41	10/08/2020	10/08/2020	0	10/08/2020	1	1	0	G. Demo	
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	32	10/26/2020	-	36	10/26/2020	0	0	0	S. Hoffman	
												Number of Clients: 5	
												Number of Households: 5	
												Total Number of Clients: 9	
												Total Number of Households: 9	
* denotes Inactive Assigned Staff													
Program Name								Project Type					
Arches Navigation Center								Emergency Shelter					
Coordinated Entry Access Point								Coordinated Entry					
Street Outreach Program								Street Outreach					
Zion Housing								PH - Permanent Supportive Housing (disability required)					

# Program Details

## [GNRL-220] Program Details Report

### (Program Based Report)

- Who's enrolled in the project
- Returns all the fields and corresponding responses for selected screens.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Unique ID	First Name	Last Name	Agency	Assigned Staff	Staff Created	Enrollment Start Date	Enrollment Exit Date	Chronic Homeless	Housing Service	Housing Service Start Date	Housing Service End Date	DOB	SSN	Personal
2	19C94E6C0	Peter	Pine	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/05/2020		N				08/03/1982	332-21-2212	919
3	74E0A28D6	Rose	Bush	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/07/2020		Y				01/01/1996	888-99-9898	993
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															

*Please note this report is only available in .zip files.*

# HMIS Data Quality Report

[HUDX-225] HMIS Data Quality Report (HUD Reports)

- Who needs support around data entry?
- Part of HUD's Data Quality Framework
- Comprehensive data review

<b>HMIS Data Quality Report [FY 2020]</b>	<b>CA-501 - San Francisco CoC: Demo Agency</b> CoC Category Filter: Agency CoC Report period 12/01/2019 - 11/30/2020
---	--

<b>Q1. Report Validation Table</b>
Program Applicability: All Projects
Total number of persons served
Number of adults (age 18 or over)
Number of children (under age 18)
Number of persons with unknown age
Number of leavers
Number of adult leavers
Number of adult and head of household leavers
Number of stayers
Number of adult stayers
Number of veterans
Number of chronically homeless persons
Number of youth under age 25
Number of parenting youth under age 25 with children
Number of adult heads of household
Number of child and unknown-age heads of household
Heads of households and adult stayers in the project 365 days or more

<b>Q2. Personally Identifiable Information (PII)</b>			
Program Applicability: All Projects			
Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues
Name (3.1)	0	0	0
Social Security Number (3.2)	0	0	4
Date of Birth (3.3)	0	0	1
Race (3.4)	0	0	
Ethnicity (3.5)	1	0	
Gender (3.6)	0	0	
Overall Score			

<b>Q3. Universal Data Elements</b>
Program Applicability: All Projects
Data Element
Veteran Status (3.7)
Project Start Date (3.10)
Relationship to Head of Household (3.15)
Client Location (3.16)
Disabling Condition (3.8)

<b>Q4. Income and Housing Data Quality</b>
Program Applicability: All Projects
Data Element
Destination (3.12)
Income and Sources (4.2) at Start
Income and Sources (4.2) at Annual Assessment
Income and Sources (4.2) at Exit
Non-Cash Benefits (4.3) at Start
Non-Cash Benefits (4.3) at Annual Assessment
Non-Cash Benefits (4.3) at Exit

<b>Q5. Chronic Homeless</b>					
Program Applicability: ES, SH, Street Outreach, TH & PH(All)					
Starting into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.9.17.3)	Number of times (3.9.17.4)
				Missing	DK/R/miss
ES, SH, Street Outreach	1			0	0
TH	2	0	0	0	0
PH (all)	4	0	1	0	0
Total	7				

<b>Q6. Timeliness</b>		
Program Applicability: All Projects		
Time for Record Entry	Number of Project Start Records	Number of Project Exit Records
0 days	6	2
1-3 days	1	0
4-6 days	0	0
7-10 days	0	0
11+ days	0	0

<b>Q7. Inactive Records: Street Outreach and Emergency Shelter</b>			
Program Applicability: Street Outreach & ES-Night By Night			
Data Element	# of Records	# of Inactive Records	% of Inactive Records
Contact (Adults and Heads of Household in Street Outreach or ES-NbN)	0	0	0%
Bed Night (All clients in ES-NbN)	0	0	0%

<b>Programs Included in Dataset</b>	
Agency	Program Name
Demo Agency	Arches Navigation Center
Demo Agency	Coordinated Entry Access Point
Demo Agency	Denali Transitional Housing
Demo Agency	Evergreen Family Individual Room Shelter
Demo Agency	Housing Ladder
Demo Agency	Problem Solving
Demo Agency	Street Outreach Program
Demo Agency	Yellowstone Congregate Shelter
Demo Agency	Zion Housing

# Annual Performance Report (APR)

## HUD Annual Performance Report [FY 2022]

### [TRAINING] System

Date Range: 06/01/2021 thru 06/10/2022

Agency cat. filter: Agency CoC

Client Location filter: No

Funding Criteria: Not Based on Funding Source

#### Q5a. Report Validations Table

Program Applicability: All Projects

Total number of persons served	2
Number of adults (age 18 or over)	1
Number of children (under age 18)	1
Number of persons with unknown age	0
Number of leavers	0
Number of adult leavers	0
Number of adult and head of household leavers	0
Number of stayers	2
Number of adult stayers	1
Number of veterans	0
Number of chronically homeless persons	0
Number of youth under age 25	1
Number of parenting youth under age 25 with children	0
Number of adult heads of household	1
Number of child and unknown-age heads of household	0
Heads of households and adult stayers in the project 365 days or more	1

#### Q6a. Data Quality: Personally Identifiable Information

Program Applicability: All Projects

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name (3.01)	0	0	0	0	0.00%
Social Security Number (3.02)	0	0	0	0	0.00%
Date of Birth (3.03)	0	0	0	0	0.00%
Race (3.04)	0	0		0	0.00%
Ethnicity (3.05)	0	0		0	0.00%
Gender (3.06)	0	0		0	0.00%
Overall Score				0	0.00%

[HUDX-227] Annual Performance Report [FY 2022] (HUD Report)

- Snapshot of Program Source Performance such as Persons Served,
- Incomplete data elements for data quality improvement. Including PII, and Universal Data Elements as well as other program related data points.
- Demographics of Persons served.
- Types of Income and Benefits
- Data Timeliness
- Program performance that shows clients progress while enrolled in the program. (Ex: Changes in Clients Income while Enrolled in a Program)
- Client length of Stay
- Exit Destinations

# Annual Performance Report (APR)

HUD Reports > [HUDX-227] Annual Performance Report [FY 2022]

Switch Access Agency(-ies)

- [TRAINING] St. Vincent de Paul Society
- [TRAINING] St. James Infirmary
- [TRAINING] Swords to Plowshares
- [TRAINING] Tenderloin Housing Clinic (THC)
- [TRAINING] Tenderloin Neighborhood Development Corporation (TNDC)
- [TRAINING] Transgender Gender Variant Intersex Justice Project (TGIJP)

CoC Filter Category: Agency CoC

CoC: CA-501 - San Francisco CoC

Program Type(s)

- Choose...
- All
- Emergency Shelter
- Transitional Housing
- PH - Permanent Supportive Housing (disability required for entry)

Program Status: All Programs

Program(s)

- Edwin M. Lee - CoC
- Fairfax Hotel - CoC
- SSVF-RRH
- Stanford Hotel - CoC
- Stanford Hotel - VASH PBV
- Swords Rapid Resolution Program

Apply Client Location Filter: No

LEGACY FEATURE: SERVICE BASED FUNDING SOURCE

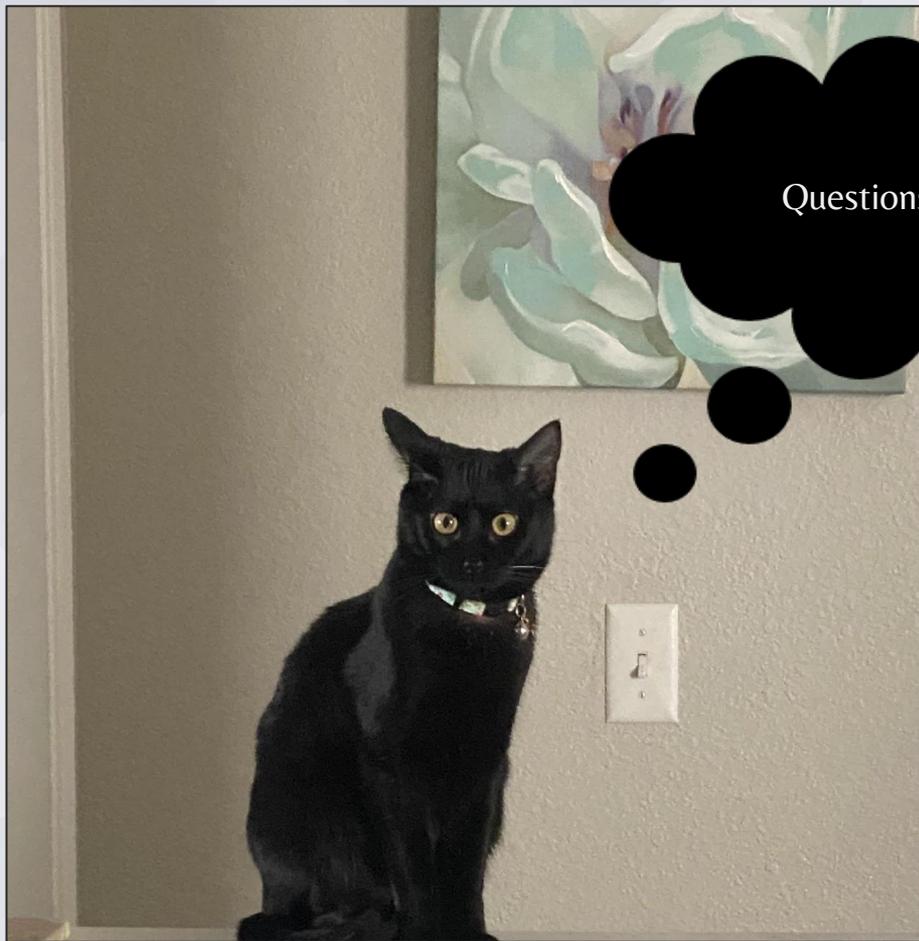
Funding Criteria: Not Based on Funding Source

Report Date Range: 01/01/2021 - 01/01/2022

Report Output Format:  Web Page  PDF  Excel  CSV-Details  CSV-Upload

Drilldown Output Format:  Web Page  CSV

SUBMIT



Questions?

# Joke of the Day!

How do pickles enjoy a day out?



# Joke of the Day!

How do pickles enjoy a day out?



Answer:

**THEY RELISH IT!**

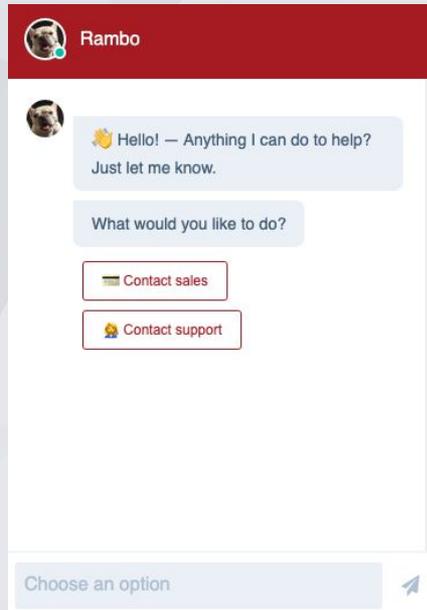
# Resources

## Bitfocus Help Desk

Email: [onesf@bitfocus.com](mailto:onesf@bitfocus.com)

Phone: (415) 429-4211

Chat Live:



A screenshot of a live chat window. At the top, a red header bar contains a profile picture of a dog and the name "Rambo". Below this, a light blue message bubble contains a yellow smiley face icon and the text "Hello! — Anything I can do to help? Just let me know." Below the message bubble is a white input field with the placeholder text "What would you like to do?". Underneath the input field are two red-bordered buttons: "Contact sales" with a briefcase icon and "Contact support" with a person icon. At the bottom of the chat window is a white input field with the placeholder text "Choose an option" and a blue send arrow icon.

**ONE System Support Site:**  
Website: [onesf.bitfocus.com](https://onesf.bitfocus.com)



A screenshot of the ONE System Support Site homepage. The page has a light beige background. At the top, a dark teal header bar contains the text "Welcome to the ONE System!". Below the header, a light beige box contains the text "Our Vision: the ONE System serves as the *single point of truth* for information about San Francisco's homeless housing portfolio, increasing the efficiency of the system by supporting and streamlining both client and provider workflows from referral to successful exit." Below this text are three white-bordered boxes with rounded corners. The first box contains the CLARITY HUMAN SERVICES logo and the text "Login to the ONE System". The second box contains an image of three white house silhouettes and the text "Vacancy Tracker" and "HSH's City-Wide Offline Vacancy". The third box contains an image of a white keyboard key with the text "Contact Us" and the text "Contact Support". To the right of the main content area, there are two white-bordered boxes with rounded corners. The top box contains the text "Announcements" and a red link "2022 HUD Data Standards". The bottom box contains the text "News and Upcoming Events", a red link "Point-in-Time and Housing Inventory Counts", and the text "SF Virtual ONE System Office Hours" and "When: Tuesday, September 27" and "Time: 2p.m. - 3p.m." and a red link "Register | HERE".