



ONE System Housing Training

Agenda

Welcome

Overview

Switching Agencies

Posting Openings

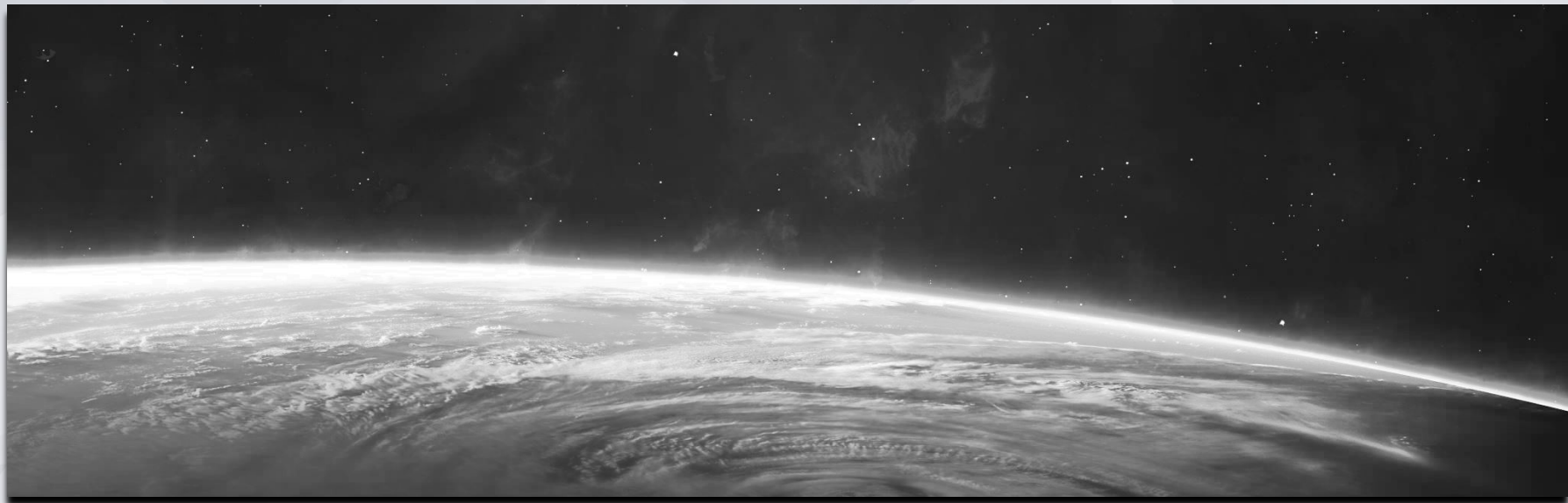
Using the Offline Vacancy Tracker

Processing Referrals

Program Enrollments & Exits

Release of Information

ONE System Refreshers



Overview

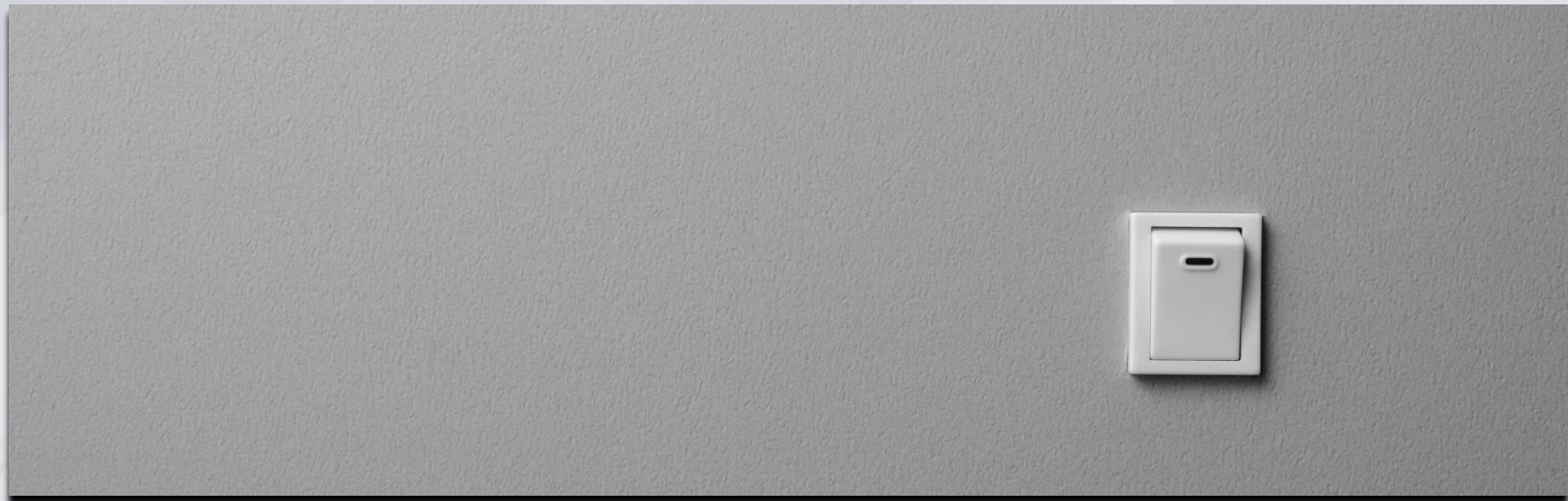
Overview

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:

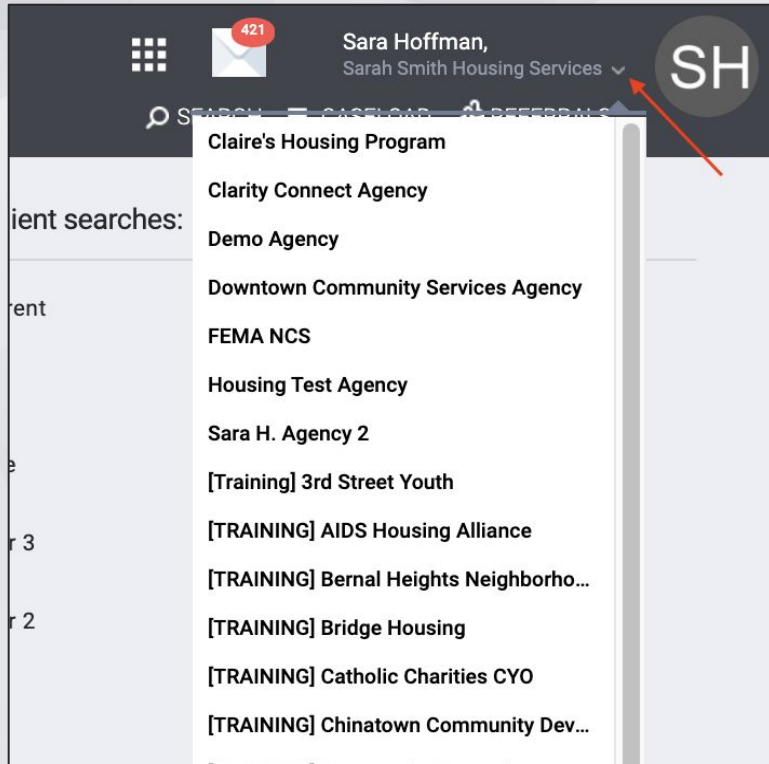
- All programs are located under the service provider agency
- Program names reflect the housing site and main funding/subsidy source
- Some housing sites have multiple programs





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 your 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 header includes the organization name, a user profile for Sara Hoffman, and navigation links for SEARCH, CASELOAD, and REFERRALS (the latter is highlighted with a red box). Below the header, the REFERRALS section is active, showing a sub-header 'REFERRALS' and a 'Last 30 day' filter. A navigation bar contains links: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Ser, **Availability** (highlighted with a red box), and Open Units. The main content area is titled 'Program Availability' and contains a table with the following data:

| 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 | | | |

Below the table, there are two messages: 'There are no available openings' and 'There are no reserved openings'. At the bottom, there are two buttons: 'ADD SINGLE OPENING' (underlined) and 'ADD MULTIPLE OPENINGS'. A red box highlights an upward arrow icon in the bottom right corner of the table area.

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 | > |
| 35 days vacant | 1BD | CNC... | Adult/VET, 18 days past due |
| 100 (TEST) | Hotel California | Unit# 124 | > |
| 35 days vacant | 1BD | CNC... | Adult/VET, 14 days past due |
| 100 (TEST) | Hotel California | Unit# 126 | > |
| 35 days vacant | 1BD | CNC... | Adult/VET, Ready for Batch ... |

Update an existing unit

Program name: Hotel California
1360 Mission

Unit number: 100

Status: Maintenance

Move out reason: Voluntary Surrender-Other

Date of vacancy: 2/23/2022

Expected date available: 4/29/2022

Notes:

Unit size: 2BD

New

Clone

Delete

Update

Cancel

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) City Wide Offline Vacancy Tracker

Hotel California

| 100 (TEST) | Hotel California | Unit# 100 | > |
|----------------|------------------|------------|--------------------------------|
| 58 days vacant | ZBD | LOSP, FAM, | Maintenance |
| 100 (TEST) | Hotel California | Unit# 100B | > |
| 58 days vacant | ZBD | 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 |
| 100 (TEST) | Hotel California | Unit# 126 | > |
| 25 days vacant | 1BD | CNC... | Adult/VET, Ready for Batch ... |

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:

Buttons: 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

Unit# 1-A... 14 days past due
Unit# 100 145 days past due
Unit# 120



Update an existing unit

Program name: Hotel California
Unit number: 100
Status: Ready for Referral
Move out reason: Voluntary Surrender-Other
Date of vacancy: 2/23/2022
Expected date available: 4/29/2022
Date posted to ONE: 5/20/2022
ONE posting ID: Lehua Asher

Units Processed/Removed from Tracker

Update

Offline Vacancy Tracker: Recently Closed Units

|   Processed Units - Posted To ONE and Transfer Completed Units City Wide Offline Vacancy Tracker Back | | | | | | | | |
|---|--------|-----------|---|------------------|----------------------|---------------|----------|-------------|
| <input type="text" value="100 (TEST)"/> | | | Property | | Search | | | |
| <input type="text" value="100 (TEST)"/> | | | <input type="text" value="Hotel California"/> | | <input type="text"/> | | | |
| 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 or 415.429.4211 to make any changes.



Processing Referrals: Referral Notifications

[TRAINING] Providence Foundation



SSCR Test,
[TRAINING] Providence Foundation ▾



🔍 SEARCH ☰ CASELOAD

INBOX: MESSAGE



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 via amazonses.com
to me ▾

12:10 PM (11 minutes ago) ☆



Dear Andrea Banas,

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

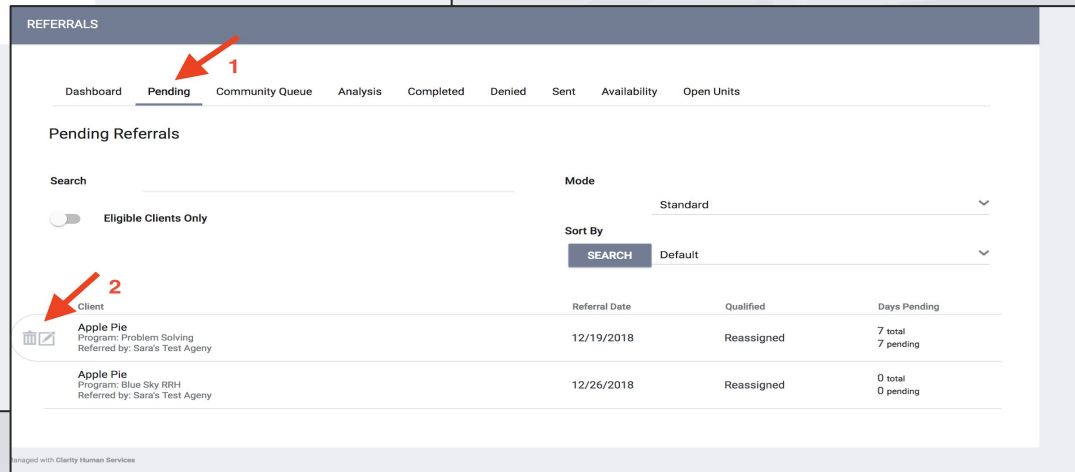
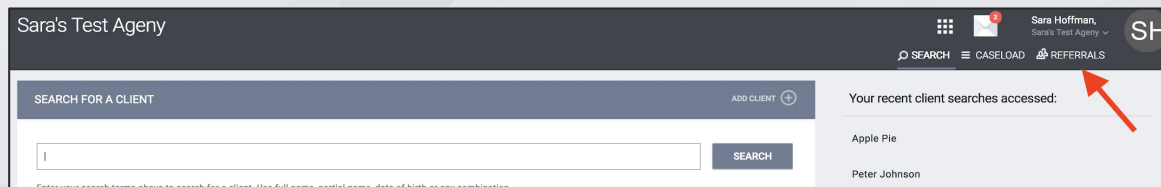
Please follow [this link](#) to view the new pending referral.

San Francisco Training System Team

Questions? Visit our online wiki: get.clarityhs.help

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.



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 | <div>✓ Pending Pending - In Process Denied Expired</div> |
| 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

SEARCH

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

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 "Processing Referrals: Denying a Referral". It contains the following fields:

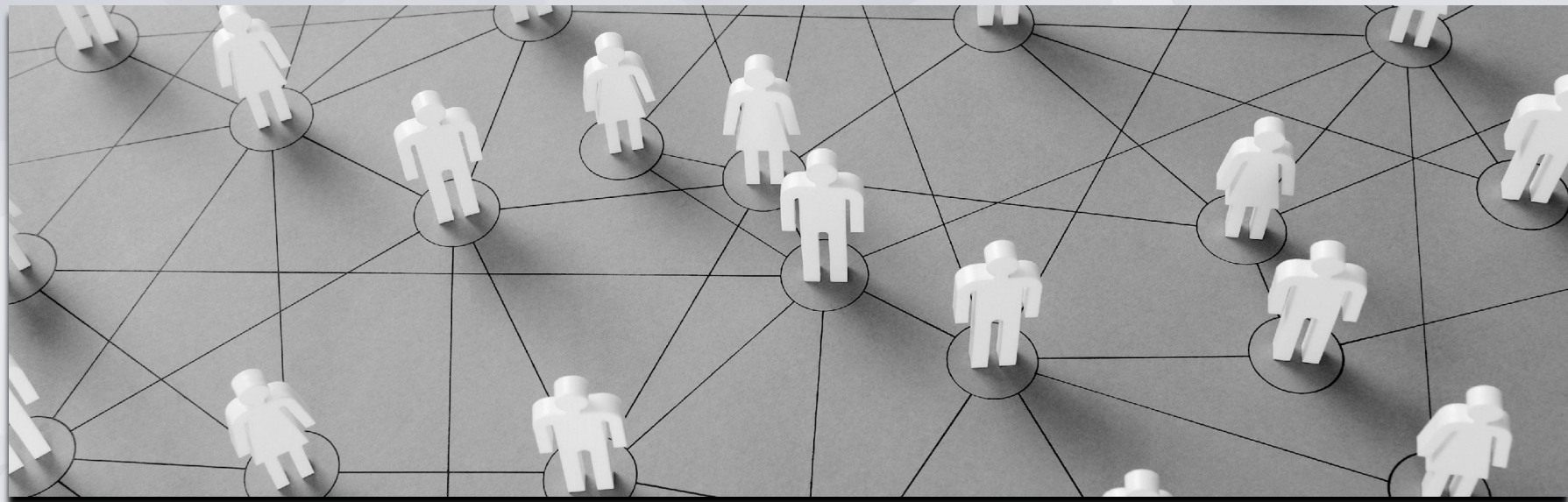
- Status:** A dropdown menu with "Denied" selected.
- Send to Community Queue:** A dropdown menu with "-- Select --" selected.
- Denied By Type:** A dropdown menu with "-- Select --" selected.
- Denied Reason:** A dropdown menu with "Select" selected.
- Denial Information:** A text input field.

A red box highlights the four fields that need to be answered after changing the status to Denied: Send to Community Queue, Denied By Type, Denied Reason, and Denial Information.

At the bottom of the form, there is a "Private" toggle switch and two buttons: "SAVE CHANGES" and "CANCEL".

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 expire 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 the 'Belles Cattikins' client profile page. At the top, a dark blue navigation bar contains the client's name and a series of tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (which is underlined), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this bar, a section titled 'PROGRAM HISTORY' is shown, but it contains a large, light blue 3D icon of a building and the text 'No results found'. The next section, 'PROGRAMS: AVAILABLE', is highlighted with a dark blue header. It contains a list of two programs: '149 Mason - LOSP' and 'Cecil Williams - CoC'. Each program entry has a small downward-pointing arrow 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 client enrollment interface. At the top, two circular progress indicators show '3 CLIENTS' and '3 UNITS'. Below these are two legends: one for 'Families' (0%) and 'Individuals' (100%), and another for 'Checked in' (10%), 'Reserved' (0%), and 'Available' (90%). The main form is divided into several sections: 'Funding Source' (HUD CoC - Permanent Supportive Housing), 'Availability' (Limited Availability), 'Service Categories' (Housing, Housing Search and Placement, Case Management), 'PROGRAM AVAILABILITY' (Available openings: 2), and 'HOUSING AVAILABILITY' (Households without children: 30 Beds in 30 Units). A toggle switch for 'Program Placement a result of Referral provided by SFHOT Practice Agency' is highlighted with a red box. To its right, a section for 'Include group members' shows 'First Last' and 'Castro Valley' with toggle switches. An orange box highlights '1 pending referral(s). Oldest 116 days.' At the bottom, there is a 'DOC REQUIREMENTS' section and an 'ENROLL' button, both highlighted with red boxes.

3 CLIENTS

3 UNITS

0 % Families
100 % Individuals

10 % Checked in
0 % Reserved
90 % Available

Funding Source
HUD CoC - Permanent Supportive Housing

Availability
Limited Availability

Service Categories:
✓ Housing
✓ Housing Search and Placement
✓ Case Management

PROGRAM AVAILABILITY:
▶ Available openings 2

HOUSING AVAILABILITY:
▶ Households without children 30 Beds in 30 Units

☒ Program Placement a result of Referral provided by SFHOT Practice Agency

Include group members:
☐ First Last
☐ Castro Valley

1 pending referral(s). Oldest 116 days.


DOC REQUIREMENTS

ENROLL


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 |
|---|------------|------------|
| Referral: Denali Transitional Housing Gartner Agency referral to Gartner Agency ⓘ | 06/22/2020 | 06/22/2020 |
| Denali Transitional Housing Gartner Agency ⓘ | 06/22/2020 | Active |

The chain link icon in the 'Active' row is highlighted with a red box.

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, the 'PROGRAM HISTORY' section is visible, featuring a table with columns for Program Name, Start Date, End Date, and Type. The table lists a program for 'Providence Family Services Center' with a start date of 09/15/2020 and a status of 'Active'. A red box highlights the 'PROGRAMS' tab and the 'Providence Family Services Center' entry. To the right, a sidebar contains links for Assessments, Notes, Files, Forms, and a red box around the 'X Exit' button. Below the table, there is a 'LINK FROM HISTORY' section with fields for Start Date and End Date, and a legend for Reservation, Service, and Referral.

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

FEPCO-HPA GF

Assessments Notes Files Forms

X Exit

LINK FROM HISTORY

Start Date End Date

10/15/2019 10/15/2019

Reservation Service Referral





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

Select

Last Name



First Name

Quality of Name

Select

Quality of DOB

Select

Date of Birth

/

/

Middle Name

None

Gender

Select

Race

Select

Ethnicity

Select

Please fill in Release of Information form

CANCEL





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><div>✓ Select</div><div>Electronic Signature</div><div>Verbal Consent</div></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

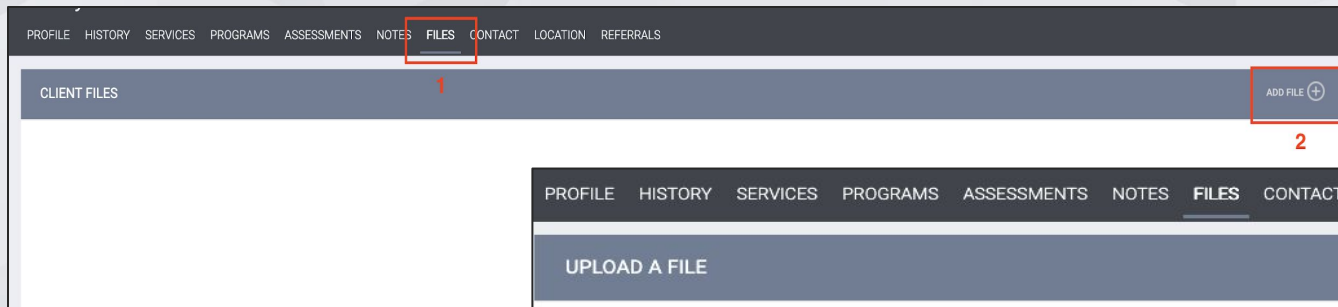
Any signed Release of Information forms must be uploaded in client files.

SAVE

CANCEL

Uploading ROIs

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



This screenshot shows the 'UPLOAD A FILE' form. The form has a dark 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 'Trouble attaching files? Switch to the Basic Uploader' is located below the 'Select File' button.



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 |



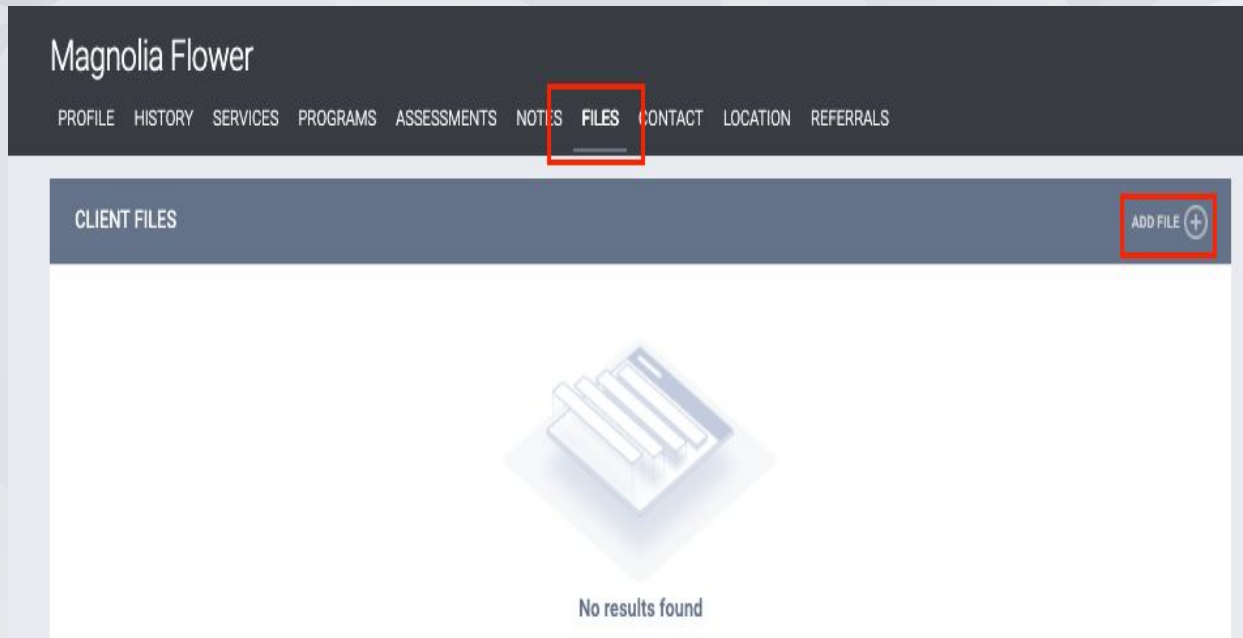
Uploading Documents

Uploading Files & Documents

From the client profile:

Files

➤ Select 'Add File' OR
➤ Select 'Add Form'

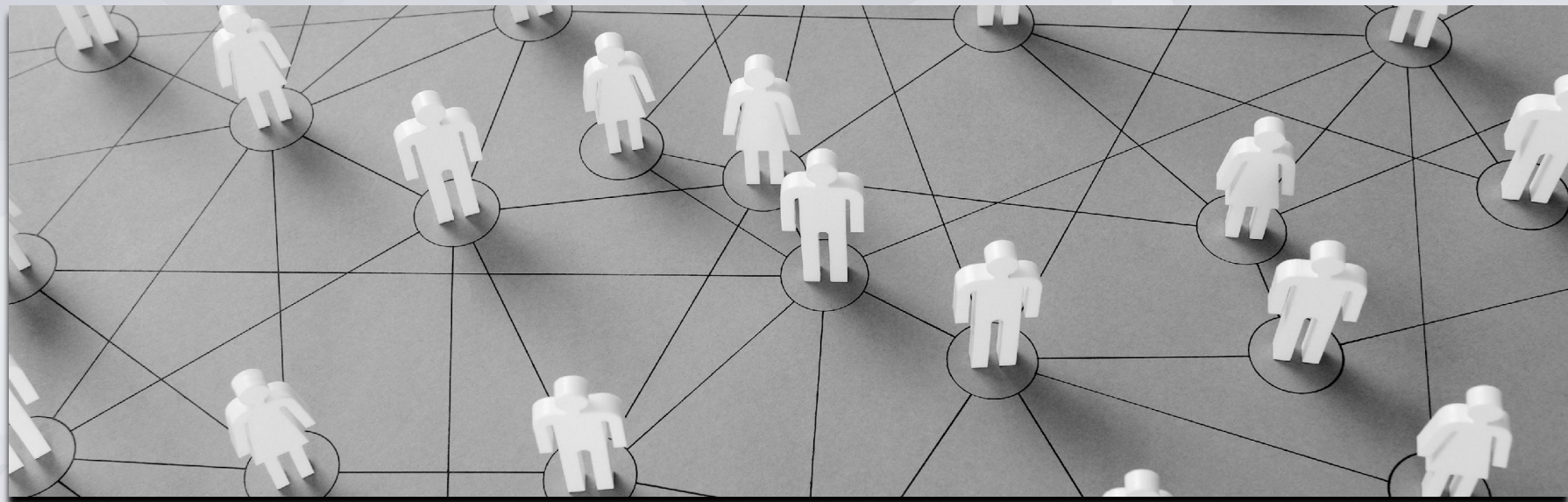


Note: Access to files is determined by access roles

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 the Bitfocus application interface for managing households. It is divided into three main sections:

- Left Panel:** Contains a 'Household Members' section with icons for a printer, calendar, and shield. Below these icons is a 'Manage' button, which is highlighted by a red arrow. Underneath, there are labels for 'Springtime Flowerchild' and 'Daughter'. At the bottom is an 'Active Programs' section.
- Middle Panel:** Titled 'Household Members', it lists two members: 'Spring Flowers' (Mother ★) and 'Springtime Flowerchild' (Daughter). A red arrow points to a pencil icon next to the 'Daughter' entry, indicating an edit action. Below this list is a section titled 'Your recent client searches accessed:'.
- Right Panel:** Titled 'EDIT GLOBAL HOUSEHOLD', it contains a form with the following fields:
 - Member Type:** Set to 'Daughter'.
 - Head of Household:** Set to 'Spring Flowers'.
 - Joined Household:** Set to '06/17/2019'.
 - Exited Household:** A toggle switch is currently turned on (blue), and it is highlighted by a red rectangle. Below this toggle is a red text prompt 'Enter Date' followed by a date input field.A 'SAVE' button is located at the bottom of the form.



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 chevron icon. The form contains eight rows, each with a text input field and a dropdown arrow. A red rectangular box highlights the column of dropdown arrows. The text in the input fields is as follows:

| Referral 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

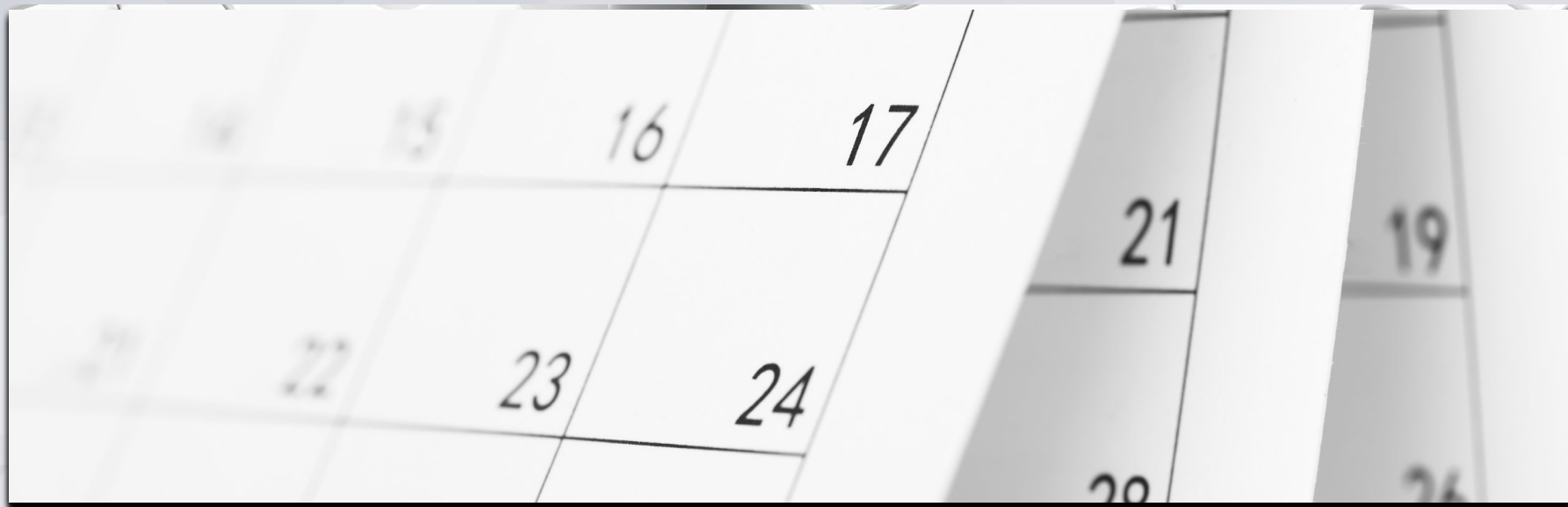
➤ Assigned Staff

➤ 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, the main content area displays 'PROGRAM: TEST MH PROGRAM AB'. Underneath this, there is a sub-navigation bar with the following options: Enrollment, **History** (highlighted with a red box), Provide Services, Assessments, Goals, Notes, Files, and Forms. The 'History' tab is active, showing a green header with '5 DAYS ACTIVE PROGRAM'. Below the header, there is a form with the following fields: 'Program Type:' with the value 'Individual', 'Program Start Date:' with the value '09/30/2020', 'Assigned Staff:' with the value 'Andrea Bañas' (highlighted with a red box), and 'Head of Household:' with the value 'CH'. A red arrow points from the 'Assigned Staff' field to a dropdown menu. The dropdown menu is titled 'CHANGE ASSIGNED STAFF' and contains a toggle for 'Make Program Private' (which is turned off), the current staff member 'Andrea Bañas' (highlighted with a red box), and a 'SAVE CHANGES' button (highlighted with a red box) and a 'CANCEL' button.



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

2 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 08/07/201

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

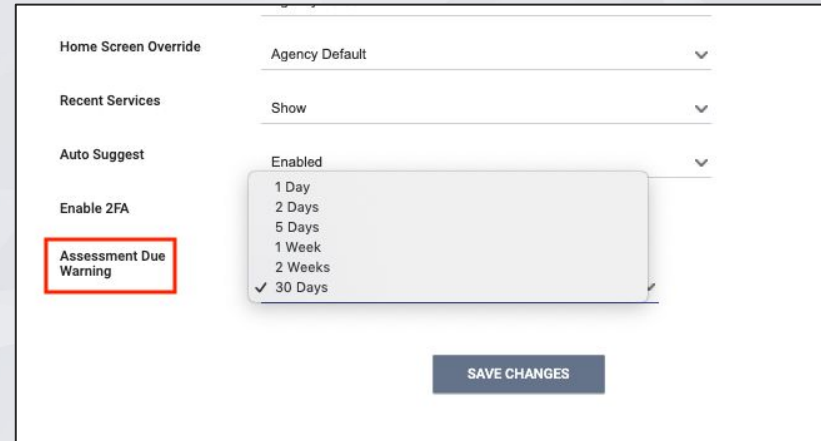
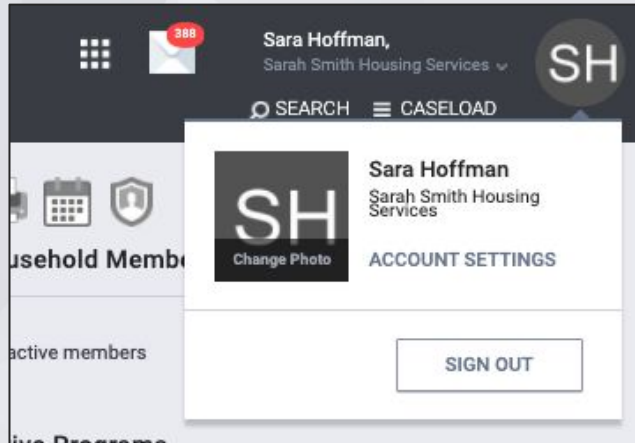
☒ Luke Test Son

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".

368 DAYS
ACTIVE PROGRAM

| | |
|---------------------|---------------------------------------|
| 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

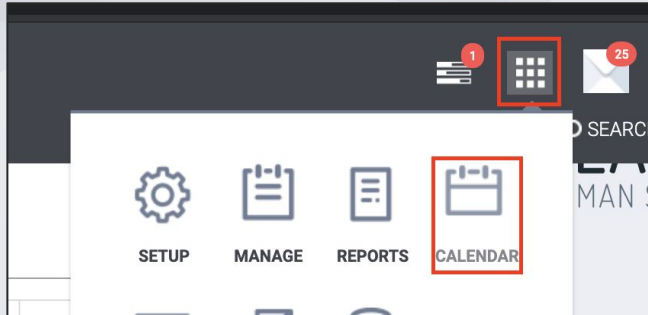
No statuses

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

| 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 | | | |
| Pending Referrals | | | | | | |
| 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 | | | |
| Pending - In Process Referrals | | | | | | |
| 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 | | | |
| Completed Referrals | | | | | | |
| Number of referrals resulting in Program enrollment | 0 | 6 | 6 | | | |
| Longest time | | | | | | |
| Shortest time | | | | | | |
| Average time | | | | | | |
| Expired Referrals | | | | | | |
| Number of expired referrals | | | | | | |
| Longest time | | | | | | |
| Shortest time | | | | | | |
| Average time | | | | | | |
| Denied Referrals | | | | | | |
| Number of denied referrals | | | | | | |
| Longest time | | | | | | |
| Shortest time | | | | | | |
| Average time | | | | | | |
| Breakdown of Referred to Programs | | | | | | |
| NOTE: P - Pending; P / I - Pending - In process; A - Accepted; D - Denied; E - Expired. | | | | | | |
| Emergency Shelter | | | | | | |
| Agency Name | Program Name | P | P / I | A | D | E |
| Demo Agency | Evergreen Family Individual Room Shelter | 0 | 0 | 1 | 0 | 1 |
| Transitional Housing | | | | | | |
| Agency Name | Program Name | P | P / I | A | D | E |
| Demo Agency | Denali Transitional Housing | 0 | 0 | 1 | 1 | 0 |
| PH - Permanent Supportive Housing (disability required) | | | | | | |
| Agency Name | Program Name | P | P / I | A | D | E |
| Demo Agency | Zion Housing | 0 | 1 | 4 | 1 | 0 |

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

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

| |
|---|
| Q1. Report Validation Table |
| 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 |

| Q2. Personally Identifiable Information (PII) | | | |
|---|-----------------------------|---------------------|-------------|
| 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 | | | |

| |
|--|
| Q3. Universal Data Elements |
| 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) |

| |
|---|
| Q4. Income and Housing Data Quality |
| 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 |

| Q5. Chronic Homeless | | | | | |
|--|------------------------|---------------------------------------|-----------------------------------|-------------------------------------|----------------------------|
| 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/missing |
| ES, SH, Street Outreach | 1 | | | 0 | 0 |
| TH | 2 | 0 | 0 | 0 | 0 |
| PH (all) | 4 | 0 | 1 | 0 | 0 |
| Total | 7 | | | | |

| Q6. Timeliness | | |
|-------------------------------------|---------------------------------|--------------------------------|
| 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 |

| Q7. Inactive Records: Street Outreach and Emergency Shelter | | | |
|--|--------------|-----------------------|-----------------------|
| 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% |

| Programs Included in Dataset | |
|------------------------------|--|
| 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 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. 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

Program(s)

All Programs

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!

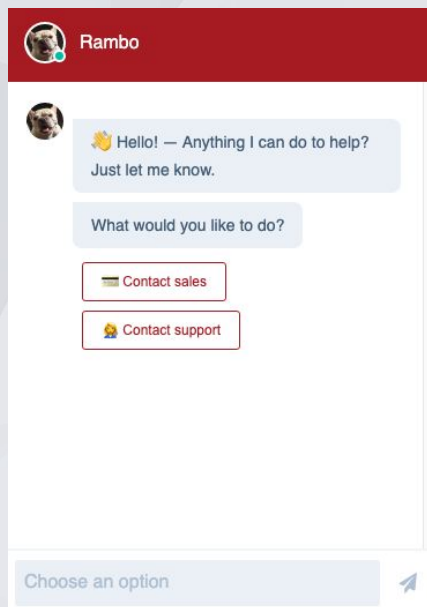
Resources

Bitfocus Help Desk

Email: onesf@bitfocus.com

Phone: (415) 429-4211

Chat Live:



ONE System Support Site: Website: onesf.bitfocus.com

