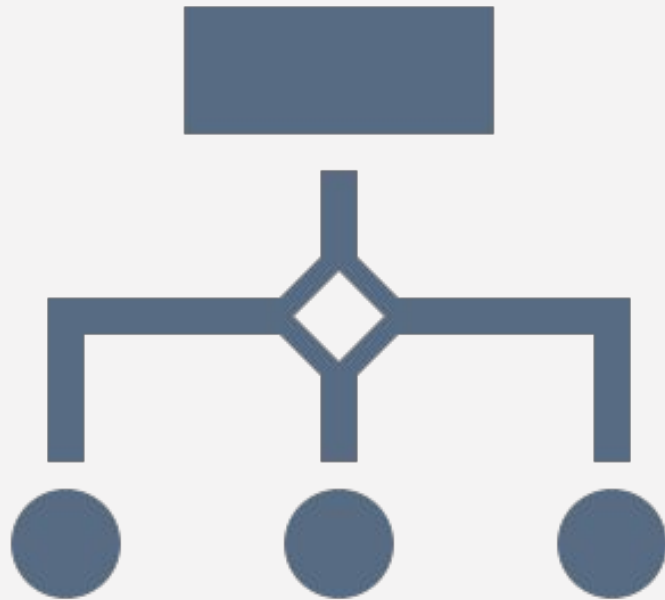




# BALDWIN NAVIGATION CENTER TRAINING

# OBJECTIVES



- Understand the workflows either involving direct referrals in ONE or enrollments without referrals
- Feel comfortable completing the necessary process to accept referrals, complete enrollments, and exit clients at your navigation center

# AGENDA

Navigation Center Workflow

Creating New Profiles in the One System

Managing Households

Contact Information

Direct Referrals

Enrollments, Exits

Housing Referral Status

Case Management Assessment

Viewing and Changing Assigned Staff

Services

Files and Documents

Notes

Reports

Timeline

Resources



# NAVIGATION CENTER WORKFLOW



```
graph LR; A[Inform Guest Placement of any offline beds and ensure that ONE enrollments are up-to-date for accurate vacancies by 7:00 am] --> B[Receive the name of an incoming client for an opening via email from Guest Placement or referral source.]; B --> C[Receive the referral in ONE for the incoming client through the "Referrals" tab  
This step will not always occur, but staff should check for incoming referrals]; C --> D[When client arrives, enroll them in ONE. Confirm all profile fields are accurate and the ROI is up to date]; D --> E[When any clients leave the Nav Center, complete the exit process in ONE. For clients who have been no-shows for 48 hours, complete the exit process.]; E --> F[Ensure all enrollments and exits are up to date by 7:00 am the following day, and email Guest Placement of any beds that are offline for the day or any mismatch with the listed availability in ONE];
```

Inform Guest Placement of any offline beds and ensure that ONE enrollments are up-to-date for accurate vacancies by 7:00 am

Receive the name of an incoming client for an opening via email from Guest Placement or referral source.

*Receive the referral in ONE for the incoming client through the "Referrals" tab*

*This step will not always occur, but staff should check for incoming referrals*

When client arrives, enroll them in ONE. Confirm all profile fields are accurate and the ROI is up to date

When any clients leave the Nav Center, complete the exit process in ONE. For clients who have been no-shows for 48 hours, complete the exit process.

Ensure all enrollments and exits are up to date by 7:00 am the following day, and email Guest Placement of any beds that are offline for the day or any mismatch with the listed availability in ONE

# Daily email to verify availability

**From:** Microsoft Power BI <[no-reply-powerbi@microsoft.com](mailto:no-reply-powerbi@microsoft.com)>  
**Sent:** Friday, February 25, 2022 12:46 PM  
**To:** Bolingbroke, Ariel (HOM) <[ariel.bolingbroke@sfgov.org](mailto:ariel.bolingbroke@sfgov.org)>  
**Subject:** Verify Available Bed Count

This message is from outside the City email system. Do not open links or attachments from untrusted sources.



Power BI

## Verify Available Bed Count

The image below shows the number of available beds indicated by the ONE System for your site. If you do not have this number of beds, please email [HSHplacement@sfgov.org](mailto:HSHplacement@sfgov.org) immediately with the correct number of available beds.

Central Waterfront

4

Bayview SAFE

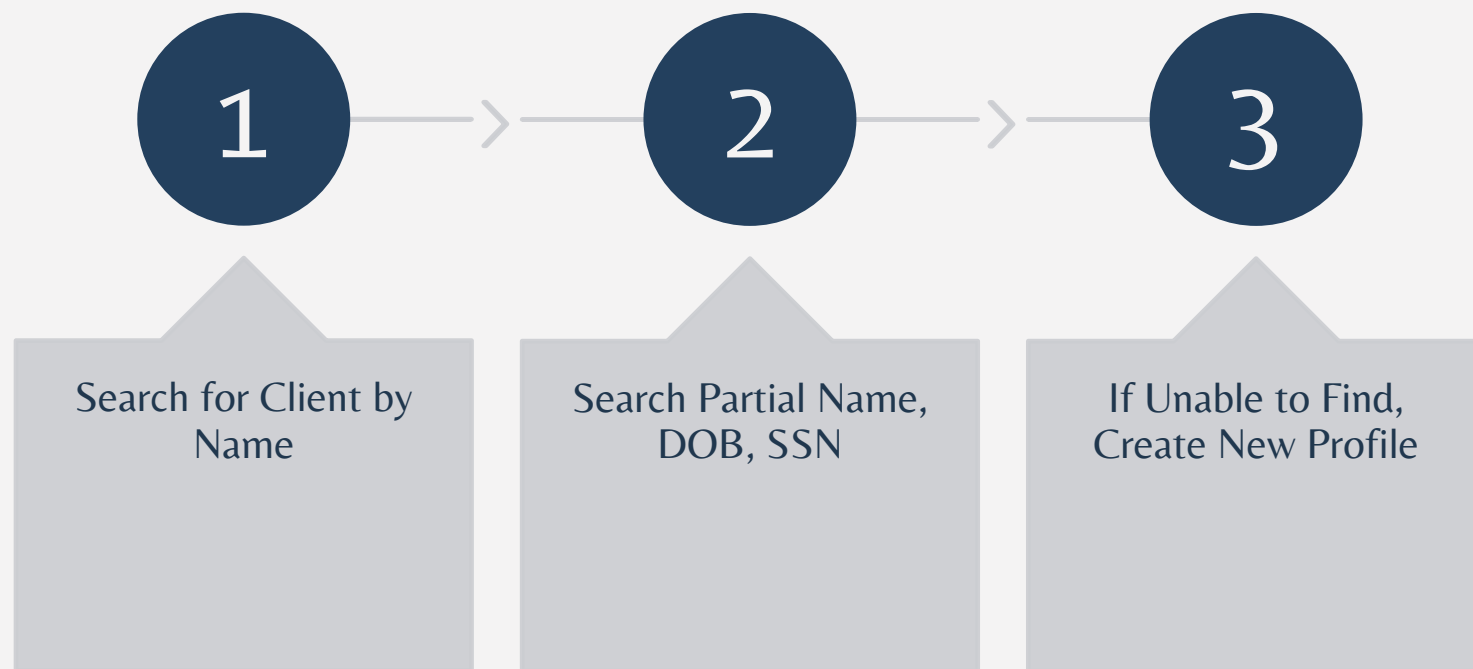
0

Data as of: 2/25/2022



# CREATING NEW CLIENT PROFILES

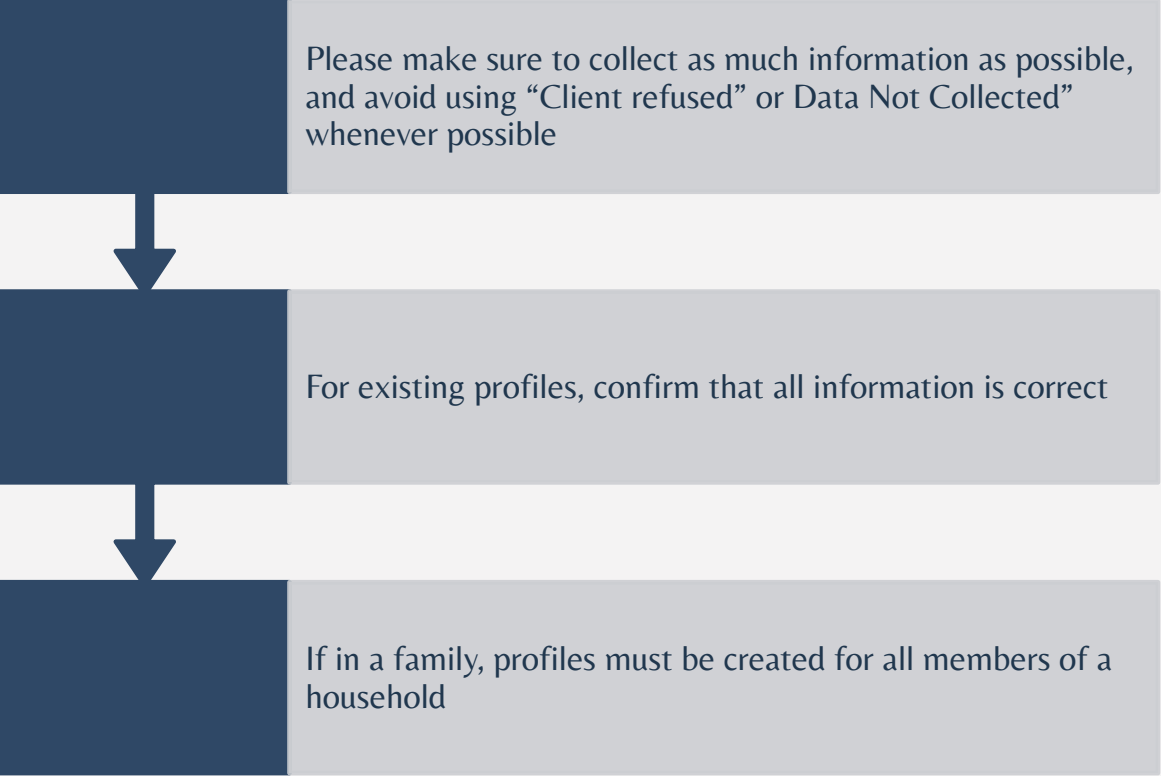
# CREATING NEW CLIENT PROFILES



The screenshot shows the 'SEARCH FOR A CLIENT' interface. At the top, there is a dark blue header bar with the text 'SEARCH FOR A CLIENT' on the left and an 'ADD CLIENT +' button on the right. Below the header, there is a search input field with the placeholder text 'Search by name, partial name, DOB or SSN' and a 'SEARCH' button. Below the search field, there is a note: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' At the bottom of the interface, there is a footer bar with the text 'Managed with Clarity Human Services' on the left and a 'Recover deleted data' link on the right.



# CREATING NEW CLIENT PROFILES



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

When creating a new client profile, 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

The screenshot displays the ONE system interface. At the top, there are three icons: a printer, a calendar, and a shield with a person icon, the latter of which is highlighted with a red box. Below these icons is the text 'Household Members' and a 'Manage' button. The main section is titled 'RELEASE OF INFORMATION' and contains a form with the following fields:

Permission	Yes	▼
Start Date	01/07/2021	25
End Date	01/07/2024	25
Documentation	✓ Select Electronic Signature Verbal Consent	

Below the form is a section titled 'ELECTRONIC SIGNATURE FORM' with a close button (X). The text in this section reads:

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.

At the bottom of the form are two buttons: 'SAVE' and 'CANCEL'.

# RELEASE OF INFORMATION

## Uploading ROI's

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

The screenshot displays the 'CLIENT FILES' section of a web application. The 'FILES' tab is selected in the top navigation bar. The 'ADD FILE' button is highlighted with a red box and the number 2. A modal window titled 'UPLOAD A FILE' is open, showing the following fields:

- Category:** Release of Information (dropdown menu)
- Predefined Name:** Release of Information: Homeless R (dropdown menu)
- File:** Select File (button)
- Private:** ☐ (toggle switch)

At the bottom right of the modal, there are two buttons: 'SAVE CHANGES' and 'CANCEL'.



# 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 family members together.

The screenshot shows a software interface with a dark header bar containing a magnifying glass icon, the text 'SEARCH', a hamburger menu icon, and the text 'CASELOAD'. Below the header, there are three icons: a printer, a calendar, and a shield with a person icon. A red arrow points from the shield icon to a 'Manage' button. The main section is titled 'Household Members' and contains a table with two rows. The first row has 'Springtime Flowerchild' in the first column and 'Daughter' in the second column. The second row is partially visible with 'Spring Flowers' and 'M'. Below this is another section titled 'Household Members' with a table containing two rows: 'Spring Flowers' and 'Springtime Flowerchild'. A red arrow points from the bottom right towards the 'Your recent client searches accessed' section.

SEARCH CASELOAD

Household Members

Manage

Springtime Flowerchild	Daughter
Spring Flowers	M

Household Members

Spring Flowers	M
Springtime Flowerchild	Da

Your recent client searches accessed

EDIT GLOBAL HOUSEHOLD

Member Type

Daughter

Head of Household

Spring Flowers

Joined Household

06/17/2019

Exited Household

Enter Date

SAVE



# 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

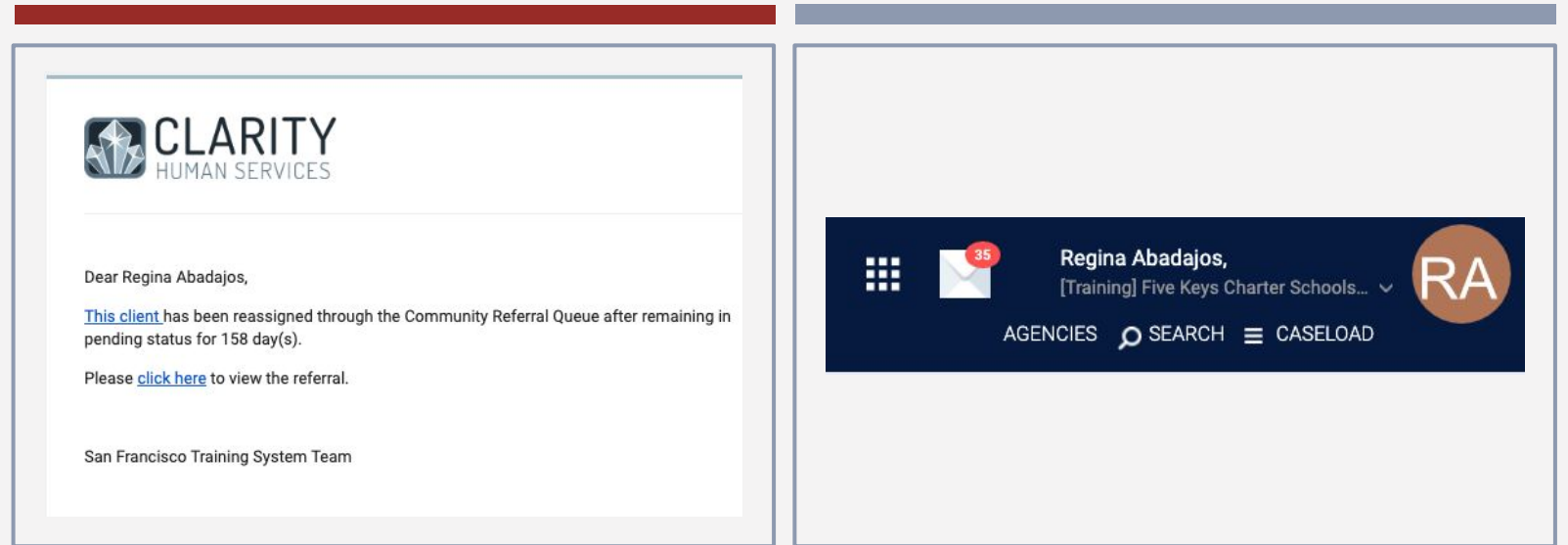
ADD CONTACT 

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



# DIRECT REFERRALS

# PROCESSING REFERRALS: REFERRAL NOTIFICATIONS



Providers will receive a notification via email and Clarity Inbox when a referral has been sent to their program.

- **Providers need to make sure the appropriate staff are set-up to receive notifications.**
- Agency Leads should contact the Bitfocus Helpdesk at [onesf@bitfocus.com](mailto:onesf@bitfocus.com) or 415.429.4211 to make any changes.





SEARCH



CASELOAD



REFERRALS

SEARCH FOR A CLIENT

ADD CLIENT +

Enter search terms for a client

SEARCH

Use full name, partial name, date of birth or any combination.

Your recent client searches:

Ginny West Coast

Christopher Shark

- Direct referrals are processed from **Referrals** dashboard on the homepage
- Referrals will be editable through **Pending** tab

## REFERRALS

**Pending** Completed Denied Sent

## Pending Referrals

Search

Mode

Standard



Sort By

Default



Characteristic

-- Select --



Eligible Clients Only

SEARCH

Client

Referral Date

Qualified

Days Pending

Ginny West Coast

Program: Central Waterfront Navigation Center

12/07/2021

No

0 total  
0 pending

Referred by: [TRAINING] HSH: SFHOT ⓘ



Edit

## Processing Referrals: Denying a Referral

- Change the status of the referral to denied
  - Four additional fields will populate that need to be answered
1. **Send to Community Queue:** Always answer *NO*
  2. **Denied by type:** Provider/client
  3. **Denied Reason:** Reason for the denial
  4. **Denial Information:** Provide additional details explaining the reason for the denial

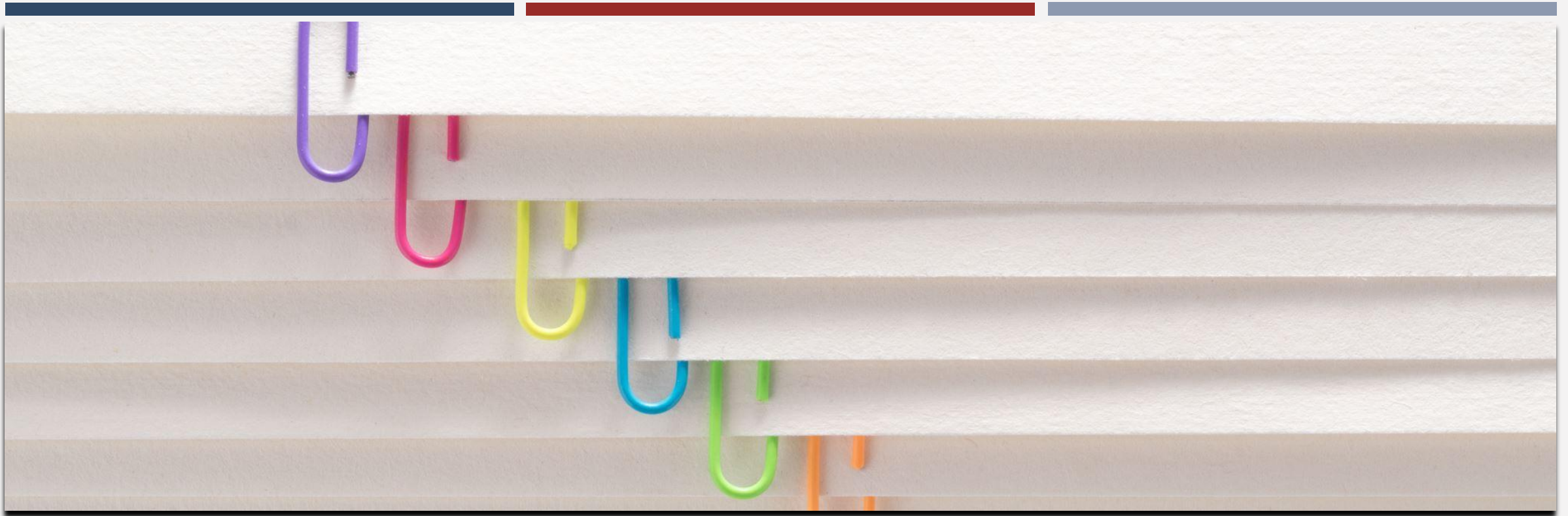
The screenshot shows a web form for denying a referral. The form is titled "Processing Referrals: Denying a Referral". It contains the following fields:

- 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: Send to Community Queue, Denied By Type, Denied Reason, and Denial Information.

Below the Denial Information field is a "Private" toggle switch, which is currently turned off.

At the bottom right of the form are two buttons: "SAVE CHANGES" and "CANCEL".



# ENROLLMENTS

# ENROLLMENTS – DIRECT REFERRAL

Ginny West Coast

PROFILEHISTORYSERVICESPROGRAMSNOTESFILESCONTACTLOCATIONREFER

PROGRAM HISTORY

PROGRAMS: AVAILABLE

Armstrong Place Senior Housing - LOSP

Central Waterfront Navigation Center

Active Clients

2

CLIENTS

0 % Families

100 % Individuals

Occupancy (Today)

2

UNITS

50 % Checked In

0 % Reserved

50 % Available

Referrals (90 Days)

2

REFERRALS

50 % Referrals Pending

50 % Referrals Connected

0 % Referrals Denied

Funding Source

Local or Other Funding Source

Availability

Full Availability

Service Categories:

Other

HOUSING AVAILABILITY:

Households without children

64 Beds in 4 Units

Program Placement a result of Referral provided by [TRAINING] HSH: SFHOT

Include group members:

Lucia Sunnies

1 pending referral(s). Oldest 0 days.

PRINT DIRECTIONS

ENROLL

Clients should be enrolled into a ONE program when their referral is sent to your Navigation Center program

Enrolling a client into your program accepts the direct referral.

- Be sure to keep toggle on to link referral to program enrollment

# ENROLLMENTS

## When enrolling a direct referral from Guest Placement...

- Confirm that all profile details are accurate and update if necessary
- Confirm that the client has a signed ROI and update if necessary
- Guest Placement may only have limited information when creating a client profile, so it is important that you update any missing fields or “Data not collected” fields when you are working with the client





# ENROLLMENTS – WITHOUT A REFERRAL

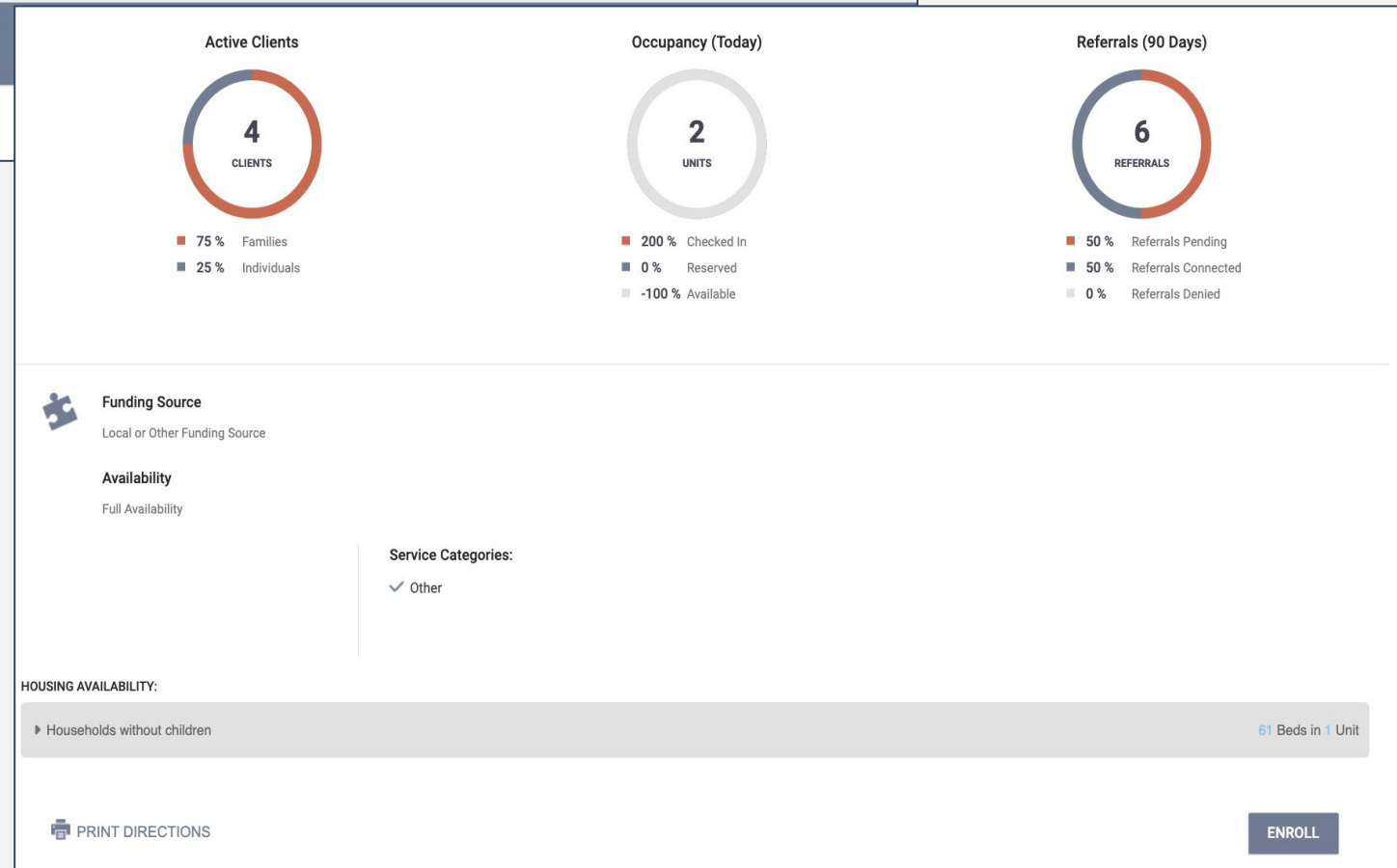
Ginny West Coast

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

## PROGRAM HISTORY

Clients should be enrolled into a **ONE** program when they are sent to your Navigation Center program. Some enrollments will not be the result of a direct referral

- The referral toggle will not be present if the program enrollment is not a result of a direct referral




NAVIGATION CENTER QUESTIONS		
Staff Completing Enrollment	Andrea B.	
Agency That Made First Contact	Coordinated Entry	
If a youth referral, please select Access Point referred from	The SF LGBT Center Access Point	
Stay Type	Housing Referral Status Stay	
Dorm #	2	
Bed #/ Room #	8	
Nav Center Locker	1234	
Are you arriving from an encampment?	No	
Arriving with any pets?	Yes	
Pet Type	Dog	Pet Name
Do you have a partner or spouse?	No	
Are you arriving with your partner or spouse?	No	
More than 2 bags?	No	
Do you need any special accommodations at this program?	No	

# ENROLLMENTS

## Enrolling Clients into a Program

- Please make sure to collect as much information as possible.
- Avoid using “Client refused” or Data Not Collected” whenever possible.
- Data entry should happen on the date of enrollment to ensure availability is up-to-date.

## ENROLLING CLIENTS INTO A PROGRAM: STAY TYPE




UNIQUE IDENTIFIER  
**5AF55AC53** ⓘ

---

COMMUNITY QUEUE

Client has an active entry on the  
Community Queue: Permanent Housing/  
RRH Queue

VIEW DETAILS

 No Contact Information Add

- Look on the client's profile page to see if a client is on any community queue. If they are, stay type is "Housing Referral Status Stay"
- If the client is not on any queue, the stay type is "Problem-Solving/Time Limited Stay"

## ENROLLING CLIENTS IN TO A PROGRAM - LOCATION

### LOCATION CLIENT SLEEPS AT WHEN NOT NAVIGATION CENTER

Where do you usually sleep? (Address when not at Navigation Center)

Turk and Hyde

Do you have other places you sleep? (Addresses or locations)

ADD LOCATION

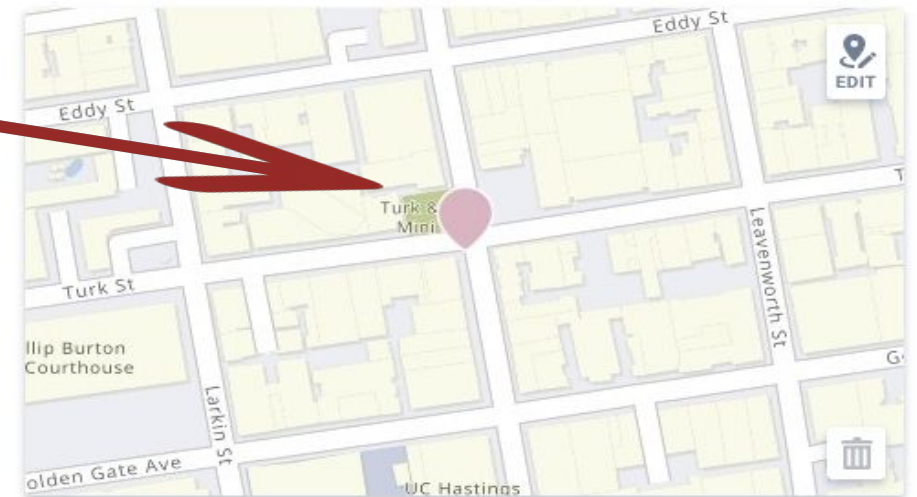
Exact addresses are best, but if there is no street address or it is unknown intersections or landmarks will suffice.

### LOCATION CLIENT SLEEPS AT WHEN NOT NAVIGATION CENTER

Where do you usually sleep? (Address when not at Navigation Center)

Turk and Hyde

Do you have other places you sleep? (Addresses or locations)



# ENROLLMENTS

## Help ensure this process goes smoothly...

- For Guest Placement to be able to accurately allocate beds to your Nav:
  - Ensure that you have completed any enrollments or exits by 7 am each morning
  - Update Guest Placement about any other offline beds.
    - Review your “availability” in ONE and if that number does not match the openings, you physically have, notify Guest Placement by 7 am



CONFIRMING  
ACCURATE  
VACANCIES

Bitfocus Test

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESCONTACTLOCATION

Confirming Place Center Housing - 2021

Central Waterfront Navigation Center

Active Clients

34  
CLIENTS

0 % Families

100 % Individuals

Occupancy (Today)

34  
UNITS

850 % Checked In

0 % Reserved

-750 % Available

Funding Source

Local or Other Funding Source

Availability

Full Availability

Service Categories:

✓ Other

HOUSING AVAILABILITY:

► Households without children

64 Beds in 4 Units



# EXITS

## PROGRAM HISTORY

Program Name	Start Date
<div>  <div>                     Providence Family Services Center                      Emergency Shelter: Entry/Exit Date                      Providence Foundation ⓘ                 </div> </div>	09/15/2020
FEPCO-HPA GF	

## PROGRAM: ECS: BAYVIEW ACCESS POINT

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

✕ Exit

## Program Service History

LINK FROM HISTORY

Service Name	Start Date	End Date
Problem Solving :Initiated Problem Solving Conversation [TRAINING] San Francisco Adult Coordinated Entry Agency	10/15/2019	10/15/2019

☒ Reservation
 ☐ Service
 ☐ Referral

- Exits should be entered when a client is no longer receiving services or staying at the Navigation Center.
  - Be sure to include an exit destination for the client.
  - You will complete an exit for all household members, if needed.
- Data entry should happen on the **same day** to ensure that availability is up-to-date for Guest Placement



# HOUSING REFERRAL STATUS






# HOUSING REFERRAL STATUS

Once in client profile, look  
under Unique Identifier to  
view Housing Referral Status

## Ginny West Coast

[PROFILE](#) [HISTORY](#) [SERVICES](#) [PROGRAMS](#) [ASSESSMENTS](#) [NOTES](#) [FILES](#) [CONTACT](#) [LOCATION](#) [REFERRALS](#)

### CLIENT PROFILE

Social Security Number	XXX - XX - 6164 
Quality of SSN	Full SSN Reported 
Last Name	West Coast
First Name	Ginny
Quality of Name	Full name reported 
Quality of DOB	Full DOB Reported 
Date of Birth	04/09/2002
	Adult. Age: 18
Middle Name	<div>Suffix None </div>



UNIQUE IDENTIFIER  
**0276CF56B**

#### COMMUNITY QUEUE

Client has an active entry on the  
Community Queue: Permanent Housing/  
RRH Queue

[VIEW DETAILS](#)



# CASE MANAGEMENT ASSESSMENT



# CASE MANAGEMENT ASSESSMENT

Please note, only those granted access to the assessment will be able to view information within the system, and only certain users will utilize the assessment.


To access the assessment:

- Go to client's History or Programs
  - Open the program enrollment
  - Select Assessments
  - Select Navigation Center Case Management Assessment
  - Select 'Start'

Lucia Sunnies

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Bayview SAFE Navigation Center-GF+HHAP+ERAF Emergency Shelter: Entry/Exit Date [Training] Bayview Hunters Point Foundation for Community Improvement	04/20/2021	Active	Individual
Embarcadero SAFE Navigation Center-GF+HHAP+ERAF Emergency Shelter: Entry/Exit Date [Training] Five Keys Charter Schools			

Lucia Sunnies

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

PROGRAM: BAYVIEW SAFE NAVIGATION CENTER-GF+HHAP+ERAF

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

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START
Navigation Center Case Management Assessment [Training]	START

# CASE MANAGEMENT ASSESSMENT

## Case Management Assessment –Tips

- How to ask questions:
  - Private or confidential space; assessing one person at a time even if they came in with a partner
  - Schedule sufficient time and try to limit interruptions
  - Take breaks as needed
  - Do not force responses
  - Come back to questions as needed.
  - Request an interpreter for clients that are Limited English Proficient

# CASE MANAGEMENT ASSESSMENT - GENERAL

The goal is to understand whether prior to coming to the Navigation Center the client was couch surfing with friends or relatives, had been in an encampment, other shelters; etc.

It is important in this conversation to ascertain whether the client is receiving case management support elsewhere, and what supports they are seeking from Nav Center staff.

GENERAL	
Describe your experience of homelessness prior to coming to the Navigation Center	<input type="text"/>
What case management support or assistance are you hoping to get at our program?	<input type="text"/>

# CASE MANAGEMENT ASSESSMENT - GENERAL

Transportation: There are transportation assistance programs specifically for people experiencing homelessness.

<https://www.sfmta.com/access-pass-application>

How do you normally get to appointments in the community?

What are your transportation needs?

Select



# CASE MANAGEMENT ASSESSMENT – WORKFORCE AND EDUCATION

People experiencing homelessness are eligible for training, job placement, and other workforce development resources such as:

- Arriba Juntos: Computer Skills, Nursing Assistant, Homecare
- Community Housing Partnership: Front Desk Clerk
- ECS: Hospitality and Culinary Arts programs.
- Goodwill: Retail Skills and Services
- Homebridge: Caregiver career program

WORKFORCE AND EDUCATION	
Income Unknown	<input type="checkbox"/>
Are you interested in work or a job change?	Select ▼
Are you currently employed?	Select ▼
Are you seeking employment?	Select ▼
Would you like to be connected to work and work supports?	Select ▼
Are you currently receiving any work supports?	<input type="checkbox"/>
Are you interested in continuing your education?	Select ▼

# CASE MANAGEMENT ASSESSMENT – SUPPORT NETWORK

How to ask questions:

- Universal Screening-
  - “these are questions we ask everyone who comes to the Navigation Center”
  - “We have started asking about it routinely”
  - “Anyone can find themselves in unhealthy relationship”
- Prioritize safety
- Non-judgmental stance
- Avoid giving advice or tell clients what they should do, i.e. couples counseling
- Take cues from the client: respond and validate feelings, respect their choices
- Ask about past, present, and future risks
- Simple supportive messages



# CASE MANAGEMENT ASSESSMENT – SUPPORT NETWORK

- Domestic Violence Resources: La Casa del las Madres
  - Visit our Drop-In Center at 1269 Howard Street
  - 415-503-0500
  - Open from 8:30am-5pm
  - Offer case management, therapy, groups, and other services \*(Available by appointment only)
  - Call our 24/7/365 crisis hotlines
    - Adult Line: 1-877-503-1850
    - Teen Line: 1-877-923-0700
  - Send a Text- 415-200-3575
  - Offer to call with the client
- Offer a life safety transfer if the client does not feel safe staying at the Nav with their partner.

# CASE MANAGEMENT ASSESSMENT – SUPPORT NETWORK

Discussing support network such as family or friends is an opportunity to revisit Problem Solving and reunifying with them if it's safe to do so.

Youth who are in foster care or formerly foster youth may be eligible for benefits under AB12  
<https://www.cdss.ca.gov/inforesources/foster-care/extended-foster-care-ab-12>

SUPPORT NETWORK	
Do you have other case management support?	Select ▼
Do you have a partner or spouse? (If Yes, add contact information to Contacts tab, complete ROI)	Yes ▼
Describe your current support network (e.g. peers, family, etc.):	<div></div>
Are you currently in foster care in San Francisco or were you ever in foster care in San Francisco?	Select ▼
In the last 12 months have you traded sex for a place to stay?	Select ▼
In the place you are staying, are you experiencing physical or sexual violence?	Select ▼
Are you currently experiencing any stress, fighting, or harm in a relationship? [If yes, further explore current safety, fear, threats and past harm.]	Select ▼
Are you a survivor of domestic violence?	Select ▼

## CASE MANAGEMENT ASSESSMENT – SUPPORT NETWORK

- Youth and adults who trade sex for a place to stay may be vulnerable to exploitation including human trafficking.
- Other signs of exploitation may include:
  - Trading sex for money or drugs
  - An abusive or controlling person in their lives
  - Unexplained access to credit cards, hotel keys, gifts, alcohol, drugs or transportation
  - Frequent nights out
  - History of past involvement with child welfare or juvenile justice
- Additional resources here: <https://bit.ly/3hmJNnE>

# CASE MANAGEMENT - HOUSING

The Navigation Center is a stop, not a destination - remember Housing is the goal!

Navigation Center case managers are critical to ensuring that clients continue the path to housing by:

- Ensuring that all vital documents are uploaded in the ONE system

- Ensuring that all clients have been assessed by the Access Point and continuing to engage with their Housing Navigator

HOUSING	
What are your housing goals?	<input type="text"/>
Are you working with a housing navigator?	<div>Select</div>
Do you have your vital documents? (please scan copies of vital documents and upload to client profile in ONE under Files)	<div>Select</div>

# CASE MANAGEMENT - LEGAL

## Examples of Legal Issues:

- Outstanding Warrants
- Immigration Needs
- Domestic Violence Legal Needs
- Custody of Children
- Employment Law

## Legal Resources:

- Bay Area Legal Aid
- Central American Resource Center
- Eviction Defense Collaborative
- Asian Pacific Islander Legal Outreach

LEGAL

Do you have a representative payee? Select ▼

Describe any current legal issues and legal support needs  
(e.g. outstanding warrants, immigration needs, etc):

# CASE MANAGEMENT - MEDICAL

- Helping clients enroll in benefits like Medi-Cal if they do not have insurance.
- Resources:
  - Shelter Health
  - Street Medicine


**MEDICAL**

AFTER COMPLETING THIS ASSESSMENT, PLEASE RETURN TO ENROLLMENT SCREEN TO ENTER ADDITIONAL HEALTH INFORMATION FOR THIS GUEST.

(If guest does not have health insurance) Are you enrolled in Healthy San Francisco ☐

Where do you seek medical care?

Primary care provider name

When did you have your last visit?  

Please describe any current medical health issues and symptoms:

Are you pregnant?

What services are you receiving for your health issues?

**DO YOU USE ANY ASSISTIVE DEVICES?**

Do you use any assistive devices? ☐

Describe any need for support with self-care or activities of daily living (e.g. bathing/hygiene, dressing, managing incontinence, taking medications, etc)

Do you have an IHSS worker? ☐



# CASE MANAGEMENT – MENTAL HEALTH

- Clients may have a broad range of mental health needs from addressing previous trauma to managing mental illness.
- Resources:
  - Shelter Health
  - Trauma Recovery Center  
<http://traumarecoverycenter.org/>
  - Psychiatric Emergency Services: (415) 206-8125
  - Mobile Crisis Team: (415) 970-4000
  - Comprehensive Child Crisis: (415) 970-3800
  - Westside Community Crisis: (415) 355-0311
  - S.F. Suicide Prevention: (415) 781-0500
  - TAY System of Care (415) 642-4525
  - Peer Run Warmline for emotional support  
855-845-7415

## MENTAL HEALTH

Have you had any mental health symptoms or treatment in the past?



Describe past mental health treatments or services

Are you currently experiencing mental health issues or symptoms?



Are you interested in receiving mental health treatment or services?



Psychiatric care



Group therapy



Counseling



Residential treatment



Other



# CASE MANAGEMENT – REASONABLE ACCOMMODATION

- Reasonable Accommodations for clients with disabilities or have an assistive device

## REASONABLE ACCOMMODATION

Do you need a reasonable accommodation?



Reasonable accommodation details

## CASE MANAGEMENT – REASONABLE ACCOMODATION

- Reasonable Accommodations for clients with disabilities or have an assistive device

### REASONABLE ACCOMMODATION

Do you need a reasonable accommodation?



Reasonable accommodation details





# CASE MANAGEMENT – SUBSTANCE USE

All programs operate under a harm reduction approach, these questions are to be asked in a non-judgmental manner prioritizing reducing harm.

Listen to how the client defines “safer use”

Resources:

- Harm Reduction Therapy Center [info@harmreductiontherapy.org](mailto:info@harmreductiontherapy.org)
- DOPE Project  
<https://harmreduction.org/our-work/action/dope-project-san-francisco/>
- San Francisco AIDS Foundation  
<https://www.sfaf.org/services/syringe-access-disposal/>

SUBSTANCE USE	
How do drugs/alcohol/other substances impact your life?	<input type="text"/>
SKIP TO CARE PLANNING IF GUEST HAS INDICATED NO SUBSTANCE USE	
When you use drugs/alcohol/other substances, do you practice harm reduction? (Examples of harm reduction practices include using new/clean syringes, bubbles, straight shooters, etc.)	Select 
Have you thought about using in safer ways?	Select 
Do you need support in using in safer ways?	Select 
Have you ever overdosed while using?	Select 
ARE YOU CURRENTLY RECEIVING SUBSTANCE USE SERVICES?	
Are you currently receiving substance use services?	<input type="checkbox"/>
Other	<input type="checkbox"/>
ARE YOU INTERESTED IN RECEIVING ADDITIONAL SUBSTANCE USE SERVICES?	
Are you interested in receiving additional substance use services?	<input checked="" type="checkbox"/>
Counseling or therapy	<input type="checkbox"/>
Methadone maintenance	<input type="checkbox"/>
Detox	<input type="checkbox"/>
Residential treatment	<input type="checkbox"/>
Suboxone treatment	<input type="checkbox"/>

# CASE MANAGEMENT – CARE PLANNING

Strengths Based - Acknowledging the client's survival skills, strengths, abilities, and resilience

Triggers/Challenges - What will help them be successful in a shared space with others?

Safety Planning:

- How does the client define safety?
- What will the client do if they feel they are unsafe?
- What does the client need from the program to keep them safe?

CARE PLANNING	
Support system (please enter supports that supplement support network of family, friends, etc.)	<input type="text"/>
Strengths	<input type="text"/>
Triggers/Challenges	<input type="text"/>
Coping skills	<input type="text"/>
Do you need a safety plan?	<input checked="" type="checkbox"/>
What are your safety needs?	<input type="text"/>

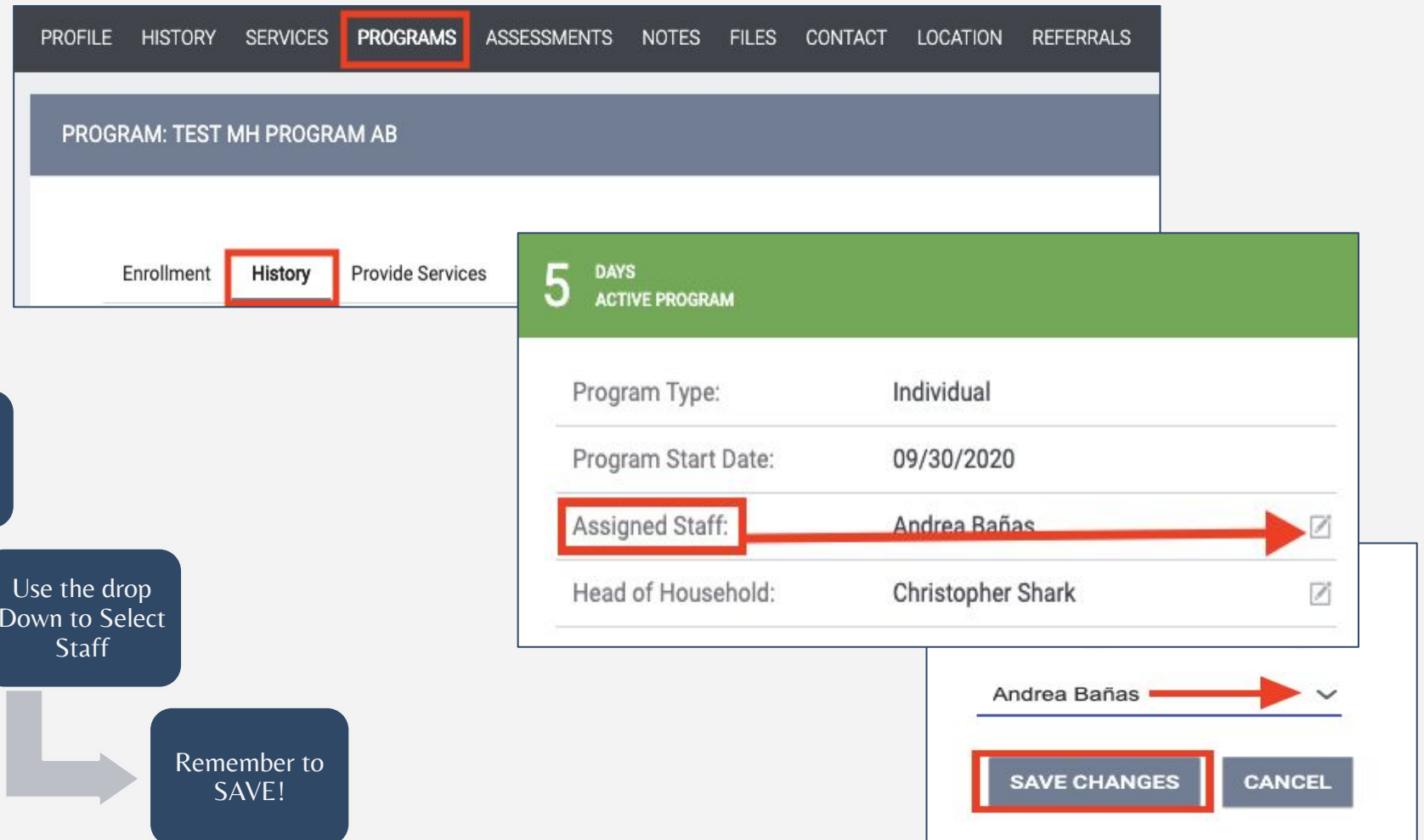
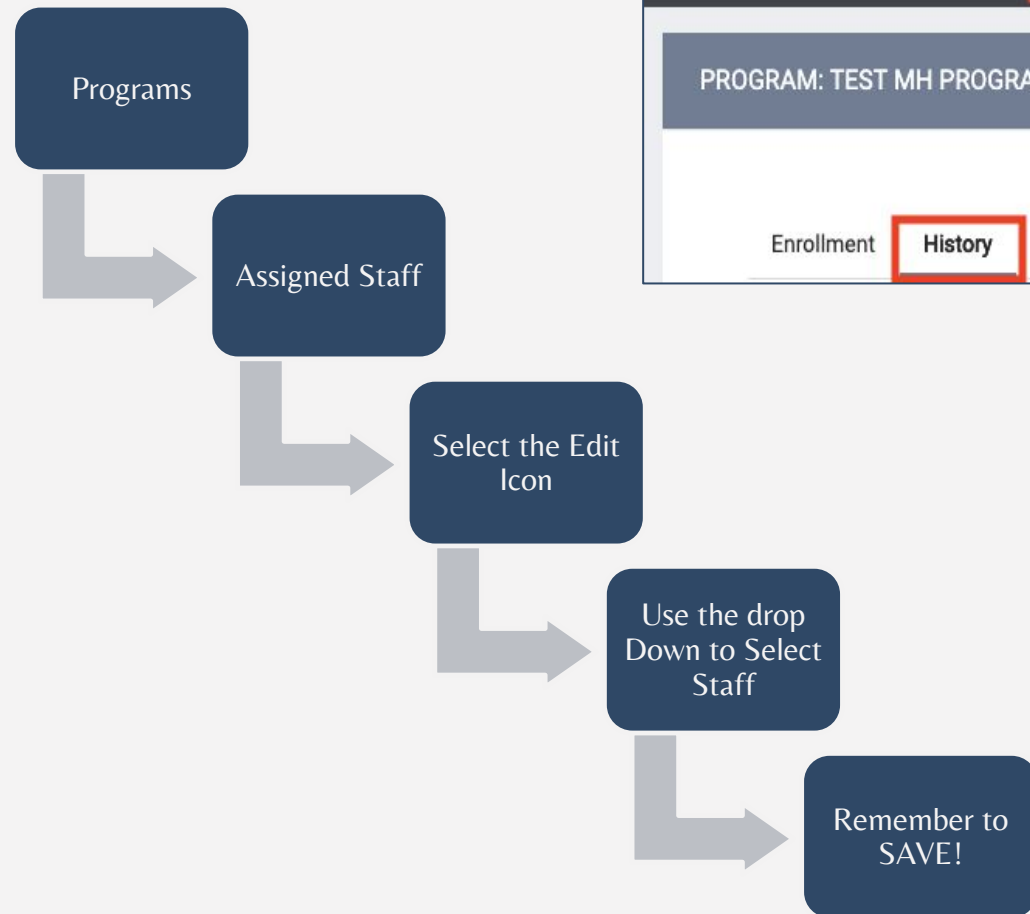


# VIEWING AND CHANGING ASSIGNED STAFF



# CHANGING ASSIGNED STAFF

In the client Profile:



The screenshot shows the 'PROGRAMS' tab selected in the client profile. The program is 'TEST MH PROGRAM AB'. The 'History' sub-tab is selected, showing a '5 DAYS ACTIVE PROGRAM' status. The 'Assigned Staff' field is highlighted with a red box, and a red arrow points to the dropdown menu. The dropdown menu shows 'Andrea Bañas' as the current staff member, with a red arrow pointing to the 'SAVE CHANGES' button.

PROFILE	HISTORY	SERVICES	PROGRAMS	ASSESSMENTS	NOTES	FILES	CONTACT	LOCATION	REFERRALS
PROGRAM: TEST MH PROGRAM AB									
Enrollment <b>History</b> Provide Services									
5 DAYS ACTIVE PROGRAM									
Program Type:		Individual							
Program Start Date:		09/30/2020							
Assigned Staff:		Andrea Bañas <input checked="" type="checkbox"/>							
Head of Household:		Christopher Shark <input checked="" type="checkbox"/>							

Andrea Bañas ☒

**SAVE CHANGES** CANCEL



# SERVICES

# SERVICES - EXTENSIONS

- Extensions are recorded using program-level services.
  - Clients must be enrolled in a Nav Center program.

Ginny West Coast

PROFILEHISTORYSERVICESPROGRAMSASSESSMENTSNOTESFILESCONTACTLOCATIONREFERRALS

PROGRAM: LOWER POLK TAY NAVIGATION CENTER- GF+HHAP+ERAF

EnrollmentHistoryProvide ServicesAssessmentsNotesFilesForms

✕ Exit

Services

HSH Approved Extension (Only Completed by HSH Staff)

Other ▾

Navigation Center Approved Extension

Other ▾

# SERVICES - EXTENSIONS

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

Ginny West Coast

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

PROGRAM: LOWER POLK TAY NAVIGATION CENTER- GF+HHAP+ERAF

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


Services


HSH Approved Extension (Only Completed by HSH Staff)

HSH Extension Date of Approval - 311 Reservation	Other ^
HSH Extension Date of Approval - CAAP Priority	^
HSH Extension Date of Approval - Medical	^
HSH Extension Date of Approval - Non-HSH Housing Offer	^
HSH Extension Date of Approval - Other [Please specify]	^
HSH Extension Date of Approval - Problem Solving Plan	^
HSH Extension Date of Approval - Residential Treatment Placement	^
HSH Extension Date of Approval - RRH	^
HSH Extension Date of Approval - Work Program	^



HSH Approved Extension (Only Completed by HSH Staff) Other ^

HSH Extension Date of Approval - 311 Reservation ^

Start Date: 01/14/2021 

End Date: 02/14/2021 

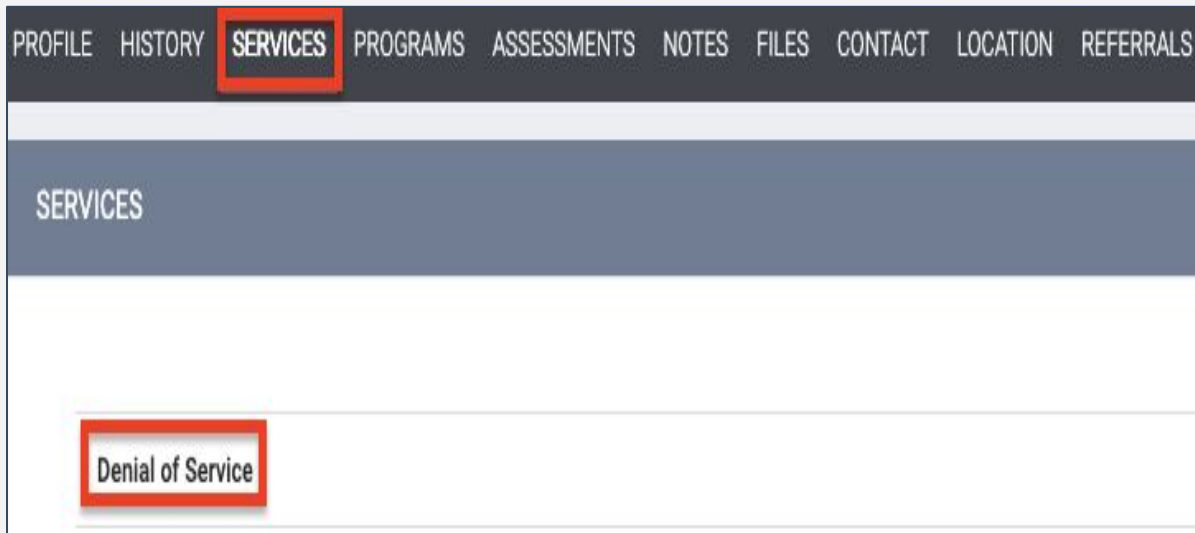
Service Note

**B** **I**  

**SUBMIT**

# SERVICES – DENIAL OF SERVICE

- Use when a guest has been issued a denial of service from the program for breaking a program rule
- Note: A Denial of Service may only be issued by a staff person who has completed the HSH Shelter Grievance Training and passed the post-test and has access rights to the service in ONE.



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

SERVICES

Denial of Service

- This is found in the client level 'Services' tab
- Enter within 3 business days of issuance

# SERVICES – DENIAL OF SERVICE

1. Start Date – The date the denial of service was issued.
2. End Date – The date the denial of service suspension period ends.
3. Service Note – Enter a note to explain further details about the denial of service incident and follow-up. When relevant, include information about the following:
  - Specific Non-Immediate DOS rule violated (for Non-Immediate DOS only)
    - DOS paperwork
    - Hearing request

Immediate Denial Reason #01: Outright refusal to comply with mask program rules

Immediate Denial Reason #02: Act of violence

Immediate Denial Reason #03: Threat of violence

Immediate Denial Reason #04: Possession or display of weapon

Immediate Denial Reason #05: Arson

Immediate Denial Reason #06: Manufacture or preparation of drugs

Immediate Denial Reason #07: Property destruction or interference affecting safety

Immediate Denial Reason #08: Absence over 48 hours

Start Date: 05/25/2021

End Date: 06/25/2021

Service Note :

B I [icon] [icon]

SUBMIT

Non-Immediate Denial (list specific rule in note)



# UPLOADING FILES AND DOCUMENTS



## UPLOADING CLIENT FILES AND DOCUMENTS

From the client profile:

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



No results found

# UPLOADING FILES AND DOCUMENTS

## FILE TYPE CATEGORIES

- ✓ Background Check
- CalWORKs HSP Documents
- CES
- Family, Social and Legal
- Finances and Income
- Health and Medical
- Homelessness Prevention Assistance Providers
- Housing Ladder Application
- HPRP Documentation
- Permanent Housing Application Forms and Documentation
- Personal Identification
- Release of Information



# NOTES

# NOTES

- Notes are used to capture activity or communications with clients, not services, document readiness, outreach attempts, vital documents.
- Should be captured at the program- level.
- Data entry should happen within three working days.
  - Date defaults to the day you are entering the note but can be changed.


Ginny West Coast

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

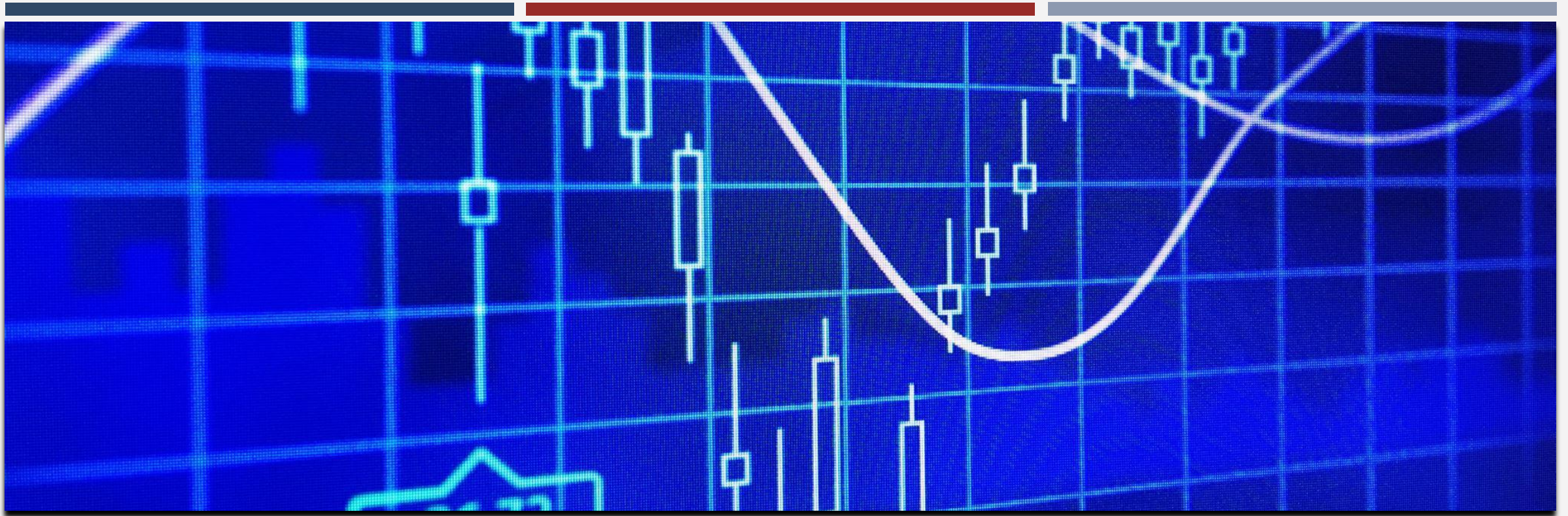
**PROGRAM: EMBARCADERO SAFE NAVIGATION CENTER-GF+HEAP**

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

Client Program Notes **ADD NOTE**

Title	Staff	Date
 Test Note 1 [Training] Five Keys Charter Schools & Programs ⓘ	Andrea Bañas	01/14/2021





# REPORTS





# REPORTS

## HMIS Data Quality Report

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

- Who needs support around data entry?
- 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			Q3. Universal Data Elements		
Program Applicability: All Projects			Program Applicability: All Projects		
Total number of persons served			Data Element	Error Count	% of Error Rate
Number of adults (age 18 or over)			Veteran Status (3.7)	0	0%
Number of children (under age 18)			Project Start Date (3.10)	0	0%
Number of persons with unknown age			Relationship to Head of Household (3.15)	1	10%
Number of leavers			Client Location (3.16)		
Number of adult leavers			Disabling Condition (3.8)		
Number of adult and head of household leavers			Q4. Income and Housing Data Quality		
Number of stayers			Program Applicability: All Projects		
Number of adult stayers			Data Element		
Number of veterans			Destination (3.12)		
Number of chronically homeless persons			Income and Sources (4.2) at Start		
Number of youth under age 25			Income and Sources (4.2) at Annual Assessment		
Number of parenting youth under age 25 with children			Income and Sources (4.2) at Exit		
Number of adult heads of household			Non-Cash Benefits (4.3) at Start		
Number of child and unknown-age heads of household			Non-Cash Benefits (4.3) at Annual Assessment		
Heads of households and adult stayers in the project 365 days			Non-Cash Benefits (4.3) at Exit		
Q2. Personally Identifiable Information (PII)			Q5. Chronic Homeless		
Program Applicability: All Projects			Program Applicability: ES, SH, Street Outreach		
Data Element	Client Doesn't Know/Refused	Information Missing	Starting into project type	Count of total records	Missing time in institution (3.917.2)
Name (3.1)	0	0	ES, SH, Street Outreach	1	
Social Security Number (3.2)	0	0	TH	2	0
Date of Birth (3.3)	0	0	PH (all)	4	0
Race (3.4)	0	0	Total	7	
Ethnicity (3.5)	1	0			
Gender (3.6)	0	0			
Overall Score					
Q6. Timeliness			Q7. Inactive Records: Street Outreach and Emergency Shelter		
Program Applicability: All Projects			Program Applicability: Street Outreach & ES-Night By Night		
Time for Record Entry	Number of Project Start Records	Number of Project Exit Records	Data Element	# of Records	# of Inactive Records
0 days	6	2	Contact (Adults and Heads of Household in Street Outreach or ES-NbN)	0	0
1-3 days	1	0	Bed Night (All clients in ES-NbN)	0	0
4-6 days	0	0			
7-10 days	0	0			
11+ days	0	0			
Programs Included in Dataset			Q7. Inactive Records: Street Outreach and Emergency Shelter		
			Program Applicability: Street Outreach & ES-Night By Night		
Agency	Program Name		Data Element	# of Records	# of Inactive Records
Demo Agency	Arches Navigation Center		Contact (Adults and Heads of Household in Street Outreach or ES-NbN)	0	0
Demo Agency	Coordinated Entry Access Point		Bed Night (All clients in ES-NbN)	0	0
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				





# QUESTIONS?

# RESOURCES

## Bitfocus Help Desk

- Email: [onesf@bitfocus.com](mailto:onesf@bitfocus.com)
- Phone: (415) 429-4211
- Website: [onesf.bitfocus.com](https://onesf.bitfocus.com)
- Chat via website or One System

