# BALDWIN NAVIGATION CENTER TRAINING

OBJECTIVES
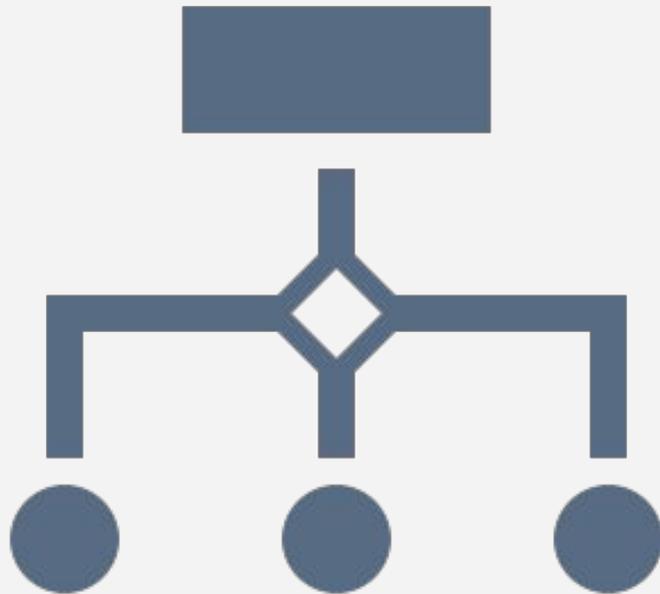
- Understand the workflows either involving direct referrals in ONE or enrollments without referrals

- 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

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

CREATING NEW CLIENT PROFILES

CREATING NEW CLIENT PROFILES

1 Search for Client by Name

2 Search Partial Name, DOB, SSN

3 If Unable to Find, Create New Profile
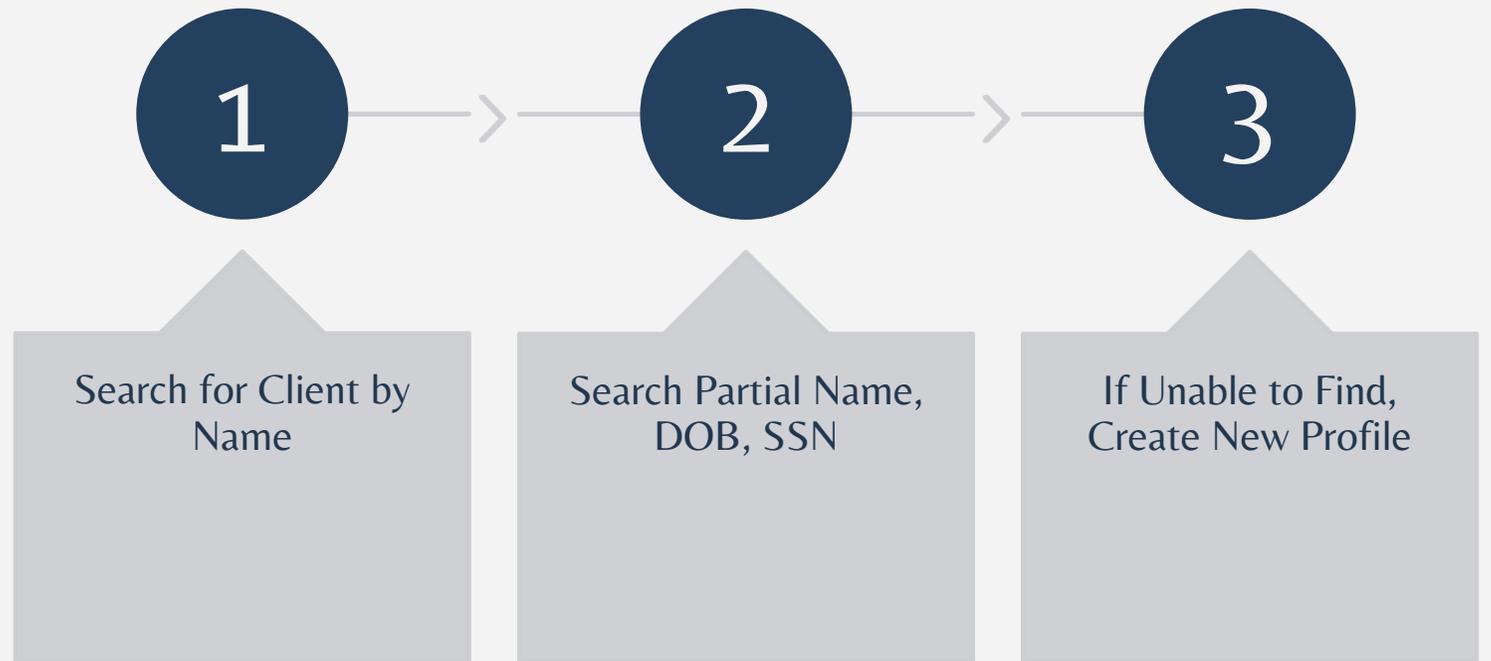
SEARCH FOR A CLIENT

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 CLIENT 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

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

RELEASE OF INFORMATION

Uploading ROI's

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

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.

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.

DIRECT REFERRALS

PROCESSING REFERRALS: REFERRAL NOTIFICATIONS

CLARITY
HUMAN SERVICES

Dear Regina Abadajos,

This client has been reassigned through the Community Referral Queue after remaining in pending status for 158 day(s).

Please click here to view the referral.

San Francisco Training System Team

Regina Abadajos,
[Training] Five Keys Charter Schools...
AGENCIES   SEARCH   CASELOAD
RA
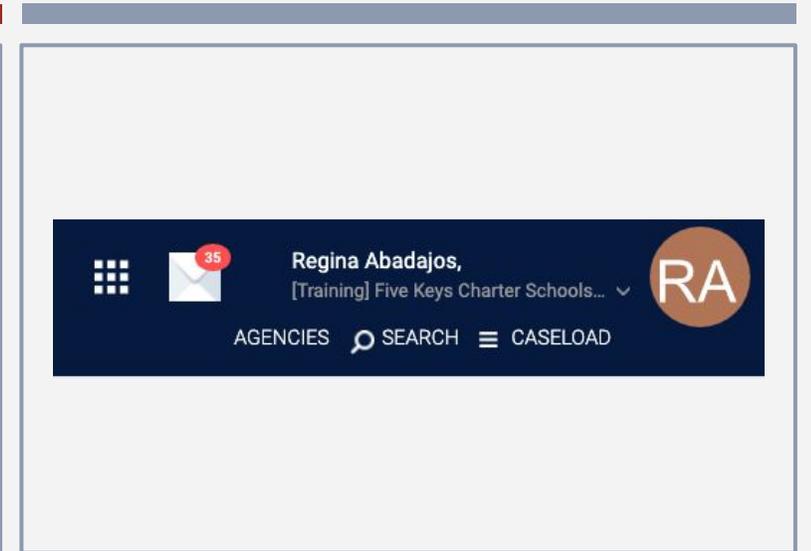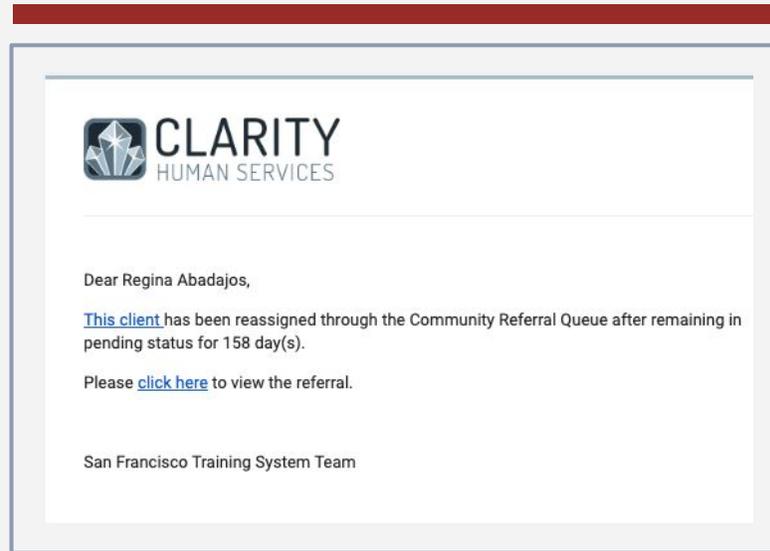
Providers will receive a notification via email and Clarity Inbox when a referral has been sent to their program.

- **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 or 415.429.4211 to make any changes.

- Direct referrals are processed from **Referrals** dashboard on the homepage

- Referrals will be editable through **Pending** tab

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
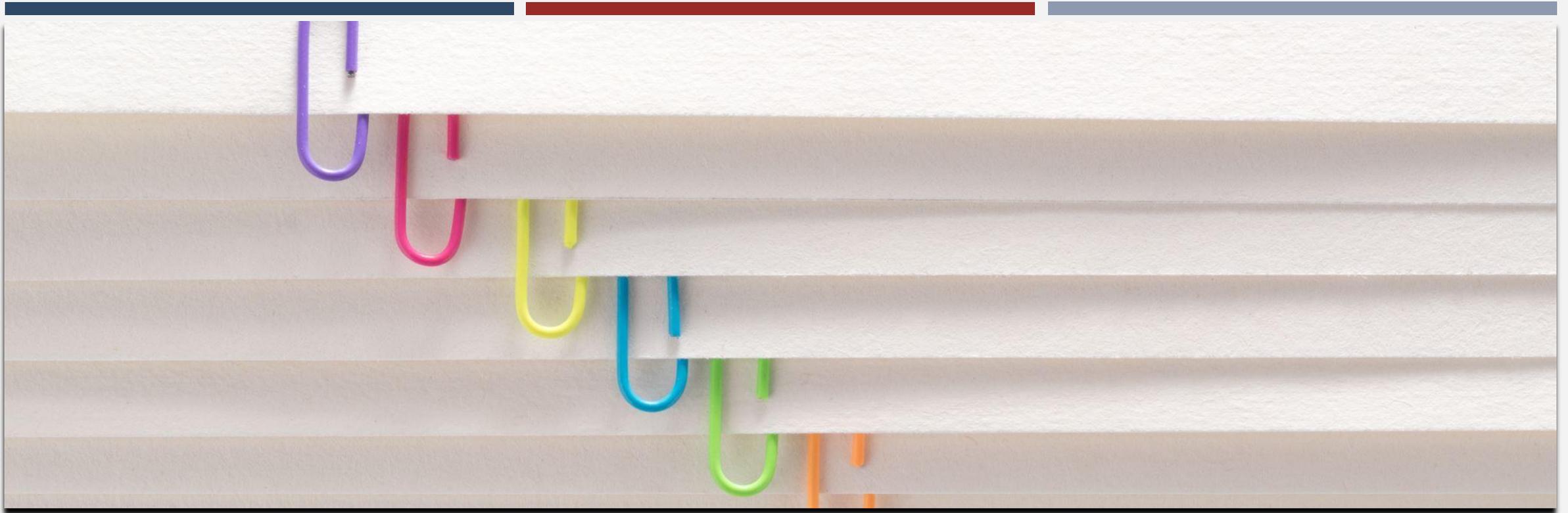
ENROLLMENTS

ENROLLMENTS – DIRECT REFERRAL

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

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

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
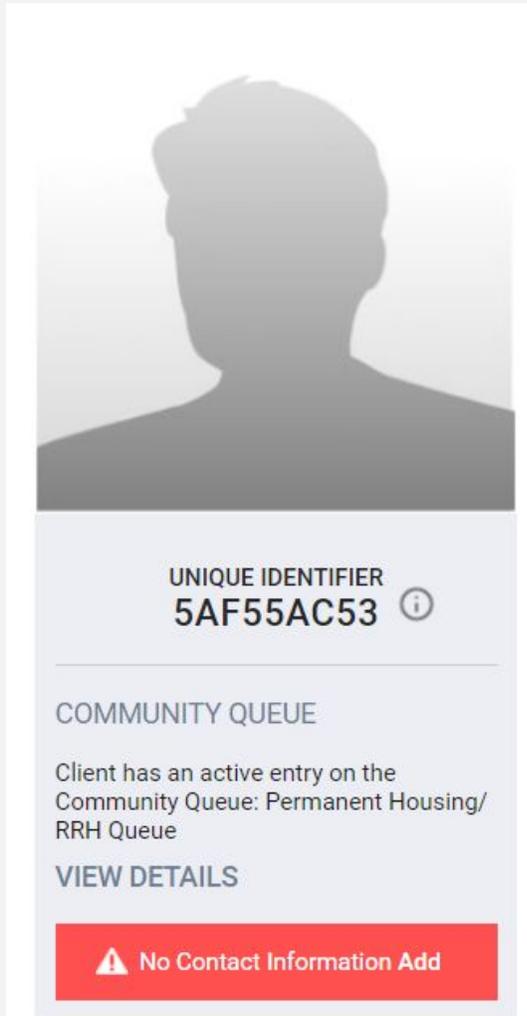
UNIQUE IDENTIFIER
5AF55AC53 ⓘ

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

Turk and Hyde

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

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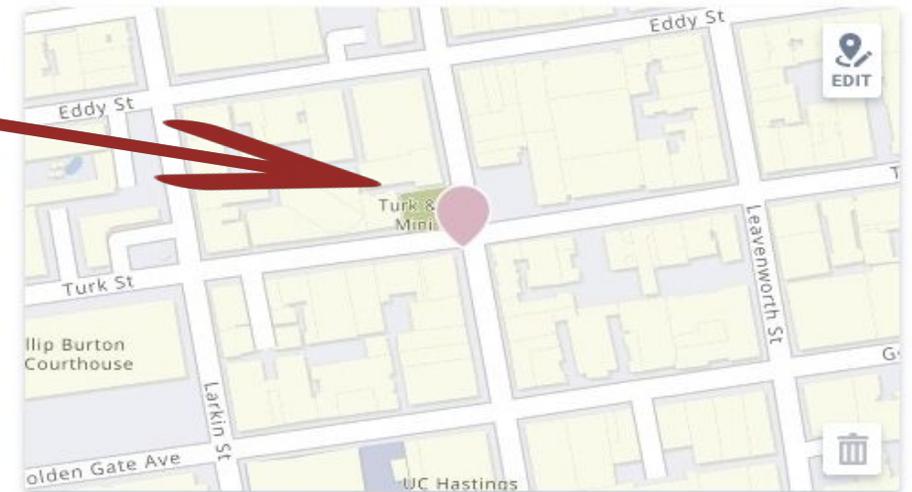
Exact addresses are best, but if there is no street address or it is unknown intersections or landmarks will suffice.

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

EXITS

- 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 | Suffix | None

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'

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

What case management support or assistance are you hoping to get at our program?

CASE MANAGEMENT ASSESSMENT - GENERAL

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

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

CASE MANAGEMENT – 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

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?

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 NEWORK

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.):

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 – 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?

Are you working with a housing navigator? Select ▼

Do you have your vital documents? (please scan copies of vital documents and upload to client profile in ONE under Files) Select ▼

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? — Select

Primary care provider name

When did you have your last visit? __/__/____

Please describe any current medical health issues and symptoms:

Are you pregnant? — Select

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 ACCOMODATION

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

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 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
- DOPE Project
  https://harmreduction.org/our-work/action/dope-project-san-francisco/
- San Francisco AIDS Foundation
  https://www.sfaf.org/services/syringe-access-disposal/

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?

VIEWING AND CHANGING ASSIGNED STAFF

CHANGING ASSIGNED STAFF

In the client Profile:

Programs

Assigned Staff

Select the Edit Icon

Use the drop Down to Select Staff

Remember to SAVE!
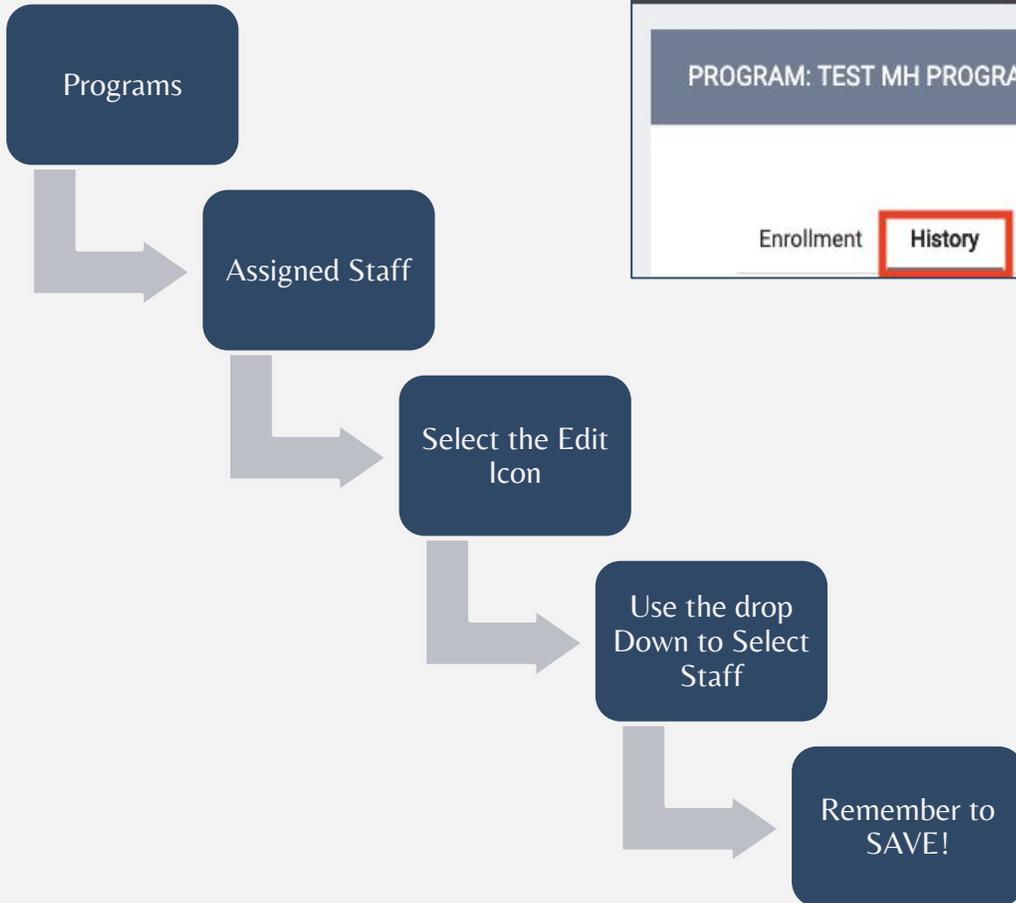
PROFILE   HISTORY   SERVICES   **PROGRAMS**   ASSESSMENTS   NOTES   FILES   CONTACT   LOCATION   REFERRALS

PROGRAM: TEST MH PROGRAM AB

Enrollment   **History**   Provide Services

5 DAYS
ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	09/30/2020
Assigned Staff:	Andrea Bañas
Head of Household:	Christopher Shark

Andrea Bañas

SAVE CHANGES   CANCEL
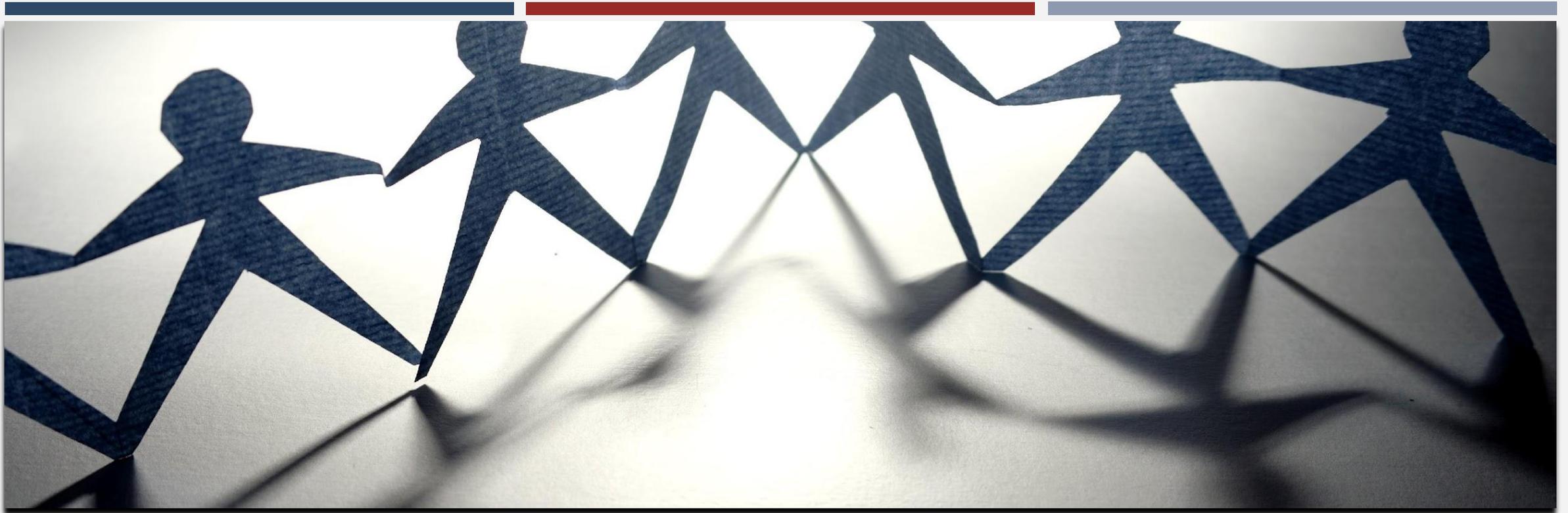
SERVICES

SERVICES - EXTENSIONS

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

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.

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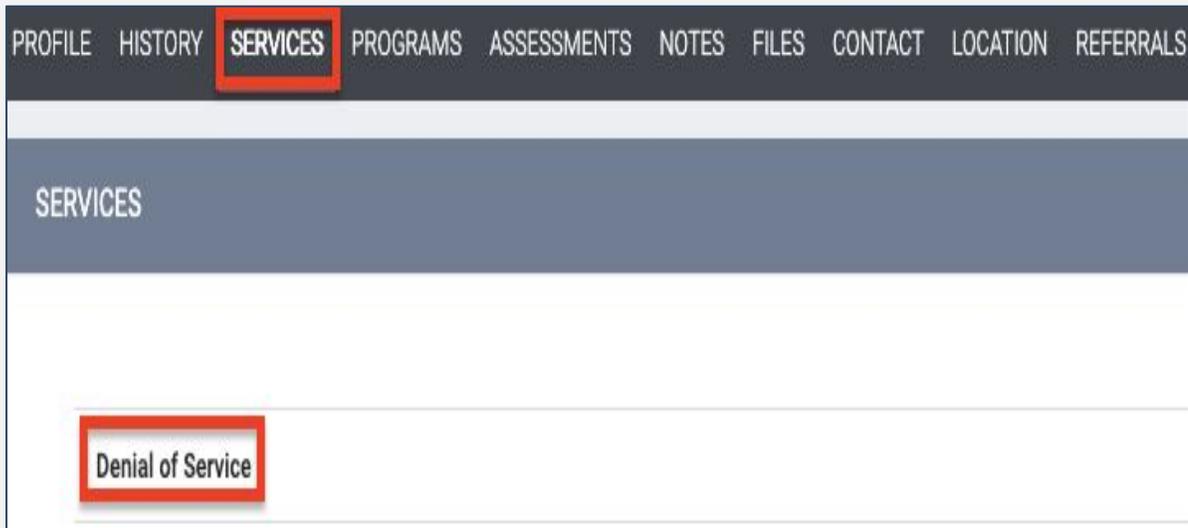
- This is found in the client level 'Services' tab
- Enter within 3 business days of issuance

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

UPLOADING FILES AND DOCUMENTS

agnolia Flower

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

CLIEN

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.

REPORTS

REPORTS

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

REPORTS

HMIS Data Quality Report

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

- Who needs support around data entry?
- Comprehensive data review

QUESTIONS?

RESOURCES

Bitfocus Help Desk

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