

Rapid Re-Housing

ONE System Training



Welcome!

Agenda

Coordinated Entry

Post Openings

Managing Referrals

Notes

Data Elements/Entry

Enrollment Date vs. Housing Move- in Date

Project Exit

Referrals Statistics/Program Roster Reports

Solutions to common problems

Q&A

Referrals in the ONE System

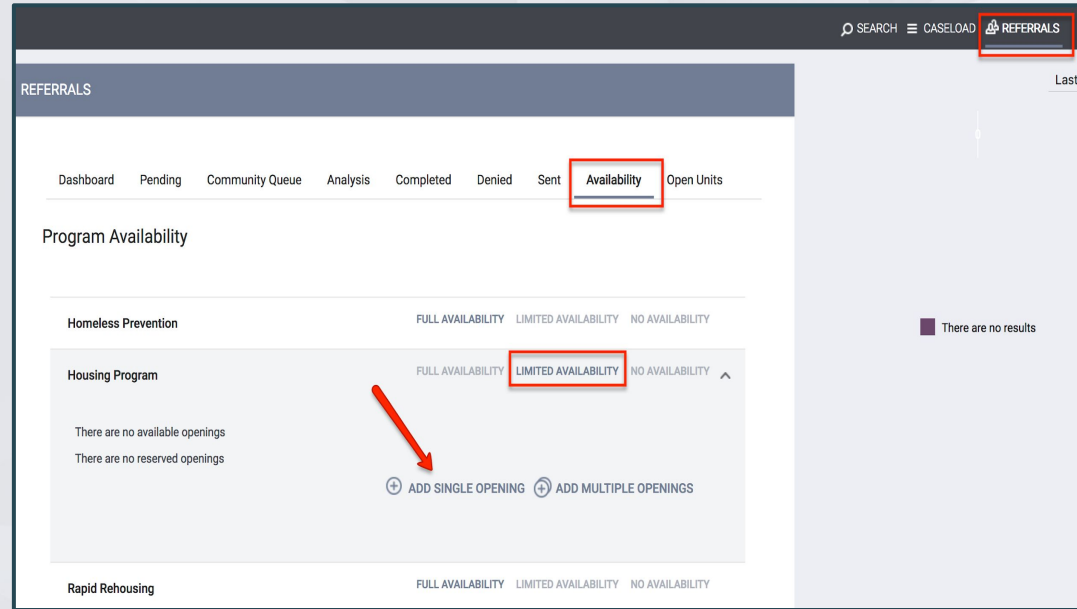


Posting Open Units

- Housing Providers/Property Managers are responsible for completing the Open Unit Form in ONE
- Posting a resource indicates to the Access Points that a opening is ready to be filled
- Filling out all fields is important to make sure Access Points have enough information to make an appropriate referral

Posting Open Units

- 1) Log in and click on Referrals
- 2) Click on Availability
- 3) Choose Limited Availability for the Required program
- 4) Click Add Single Opening or Add Multiple Openings



Posting Open Units

- Be sure to include a unique label for all openings even those that don't have a unit number (i.e. RRH)
- Providers/ Property Managers must indicate what population the resource can serve

The screenshot shows a web form titled "ADD AN OPENING" with a close button in the top right corner. The form contains the following fields and controls:

- Date:** A date input field with a calendar icon. An annotation "Date the unit is available" with a red arrow points to this field.
- Additional Notes:** A text input field.
- Unit Number:** A text input field. A purple arrow points to this field with the annotation: "Every opening needs an unit number; even for scattered site programs (i.e. RRH). You can create a numbering system that works for your agency (i.e. RRH #1 or Program Name #1)".
- Unit Size (# of bedrooms):** A text input field.
- Minimum Household Size (min. # of ppl):** A text input field.
- Maximum Household Size (max. # of ppl):** A text input field.
- What floor is the unit on?:** A text input field.
- Does the building have an elevator?:** A toggle switch.
- Does the building have stairs?:** A toggle switch.
- Sub-Population:** Three toggle switches for "Veteran", "Adult", and "Family". A blue circle highlights these three switches, with an annotation: "Please indicate what population the resource can serve".
- ADA Unit:** A toggle switch.
- Chron A:** A toggle switch.
- HDAP:** A toggle switch.
- MHSA:** A toggle switch.
- Access Point Staff Responsible for Filling Opening (Field for AP use only):** A text input field.

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

Referrals

When a referral is made...

- The referral is made to a specific housing resource
- Referral is moved from community queue to the “Pending Tab”
- Agency receives notification of referral

Referral Notifications

- Providers will receive a notification via email when a referral has been sent
 - **Providers need to make sure the appropriate staff are set- up to receive notifications**
 - ONE System Leads should contact the Bitfocus Helpdesk at onesf@bitfocus.com or 415.429.4211 to make any changes

Pending Referrals Tab

- 1) Go to Referrals tab
- 2) Next, select the Pending tab
- 3) Open the Referral

[TRAINING] Always Awesome Agency

Janel Fletcher, [TRAINING] Always Awesome Agency

SEARCH CASELOAD **REFERRALS**

REFERRALS

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

Pending Referrals

Search Mode Standard
Eligible Clients Only ☐ Sort By Default

Client	Referral Date	Qualified	Days Pending
Raz Berry Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Cherry Pit Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	199
Jill Test Program: Excellent Program Referred by: [TRAINING] Bayview Access Point	05/21/2018	Reassigned	87

Referrals

Providers should know...

- “Pending Status Notification” - Sent every 7 days if status isn't changed
- “Referral Threshold”- referrals sent back to the CQ in 90 days if status isn't changed

Pending-In Process

- Change the Status from Pending to Pending-In Process
- 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><div>✓ Pending</div><div>Pending - In Process</div><div>Denied</div><div>Expired</div></div>
Private	

SAVE CHANGES CANCEL

Pending-In Process

- Color of referral changes to green when status is changed
- “In-Process Notification”- sent 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
Apple Pie Program: Problem Solving Referred by: Sara's Test Agency	12/19/2018	Reassigned	21 total 21 pending 0 in process
Apple Pie Program: Blue Sky RRH Referred by: Sara's Test Agency	12/26/2018	Reassigned	14 total 14 pending

Denying a referral

- Make determination as soon as possible
- Select denial reason
- Always send back to CQ unless deceased or housed

Qualified	Reassigned
Adult Priority score	57
Referred by Staff	Sara Hoffman
Case Manager	Select ▼
Last Activity	01/09/2019 CHECK-IN
Status	Denied ▼
Send to Community Queue	-- Select -- ▼
Denied Reason	Select ▼
Denied Message	<input type="text"/>
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL

Accepting the Referral

- To accept a referral, the agency must enroll the client into the program
- The enrollment needs to be linked to the referral

The screenshot shows a web form for accepting a referral. At the top, there are two tabs: 'Funding Source' and 'Availability'. The 'Funding Source' tab is active, showing 'HUD:CoC - Rapid Re-Housing'. The 'Availability' tab shows 'Limited Availability'. Below these tabs, there are two sections: 'PROGRAM AVAILABILITY:' and 'HOUSING AVAILABILITY:'. The 'PROGRAM AVAILABILITY:' section shows 'Available openings' with a count of '1'. The 'HOUSING AVAILABILITY:' section shows 'Households with at least one adult and one child' with a count of '25 Beds in 15 Units'. At the bottom right, there is a red button that says '1 pending referral(s). Oldest 14 days.' Below this, there is a toggle switch for 'Program Placement a result of Referral provided by Sara's Test Agency'. The toggle switch is currently turned on. At the bottom left, there are two links: 'PRINT DIRECTIONS' and 'DOC REQUIREMENTS'. At the bottom right, there is a red button that says 'ENROLL'.

Funding Source
HUD:CoC - Rapid Re-Housing

Availability
Limited Availability

PROGRAM AVAILABILITY:

▶ Available openings 1

HOUSING AVAILABILITY:

▶ Households with at least one adult and one child 25 Beds in 15 Units

1 pending referral(s). Oldest 14 days.

☒ Program Placement a result of Referral provided by Sara's Test Agency

[PRINT DIRECTIONS](#) [DOC REQUIREMENTS](#)

ENROLL

Services

- RRH programs have services set up in ONE
- Services document
 - Client assistance
 - Show client engagement
 - Document the housing search and move in process
 - Show client activity in a program
 - Inform other users in the system of client's status (i.e Access point Staff)
- Notes can be entered within a service
 - An additional note does not have to be entered

Services

- 1) Click the “Program” tab
- 2) Open the program enrollment
- 3) 3) Click “Provide Service”
- 4) Click the drop down next the service provided

The screenshot displays a web application interface. At the top, a dark navigation bar contains several tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted with a red box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a section titled 'PROGRAM HISTORY' contains a table with columns for Program Name, Start Date, End Date, and Type. The first row shows 'Berkely RRH' with a red box around a small icon to its left. The second row shows 'LYRIC Access Point'. Below the table is a section titled 'PROGRAMS: AVAILABLE'. The bottom part of the screenshot shows the 'PROGRAM: BERKELY RRH' page. It has a sub-navigation bar with 'Enrollment', 'History', 'Provide Services' (highlighted with a red box), 'Assessments', 'Notes', 'Files', 'Chart', and 'Forms'. Under the 'Provide Services' section, there is a list of services with corresponding dropdown menus. The services listed are 'Document Ready', 'Education Services', 'Full/Part-Time Unsubsidized Employment', 'Housing Search', and 'Workforce Development Program'. The dropdown menus show options like 'Housing Search and Placement', 'RHY Service', 'Employment', and 'No Category'. A red box highlights the dropdown menu for 'Workforce Development Program'.

Program Name	Start Date	End Date	Type
Berkely RRH Sara H. Agency 2	08/07/2019	Active	Individual
LYRIC Access Point [TRAINING] San Francisco Youth Coordinated Entry Agency	04/01/2019	04/01/2019	Individual

PROGRAMS: AVAILABLE

PROGRAM: BERKELY RRH

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

Services

Document Ready	Housing Search and Placement
Education Services	RHY Service
Full/Part-Time Unsubsidized Employment	Employment
Housing Search	Housing Search and Placement
Workforce Development Program	No Category

Services

- 1) Click the applicable service item
- 2) Enter the date the service was provided and a case note

Services

Document Ready

Housing Search and Placement ^

All Required Documents Posted for Housing Referral

Start Date:

08/07/2019

End Date:

08/07/2019

Service Note

B I [icon] [icon]

Enter Case Note

SUBMIT

Notes

- Notes are entered under the notes tab prior to and after the client is enrolled in the RRH program
- Notes allow for information to be shared other users including access point staff
- Notes are entered when there is no applicable service to record

Notes

- 1) Click the “Notes” tab
- 2) Click Add Note
- 3) Type in title, adjust date if necessary
- 4) Type note
- 5) Click “Save Changes”

The screenshot displays the Bitfocus Notes application interface. At the top, a navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, **NOTES** (highlighted with a red box), FILES, CONTACT, and LOCATION. Below this, a 'CLIENT NOTES' header bar features an 'ADD NOTE +' button (also highlighted with a red box). The main content area shows 'There are no results to display'. A sidebar on the left contains 'PUBLIC ALERTS' and a section titled 'Managed with Clarify Human Services'. The right panel is a form for adding a new note, with fields for Title, Agency (set to 'Five Keys Charter Schools & Programs'), Date (set to '08/06/2019' with a calendar icon), and a 'Time Tracking' dropdown. The 'Note' field is a large text area with a rich text editor toolbar. At the bottom, there is a 'Private' toggle switch and 'SAVE CHANGES' and 'CANCEL' buttons.

Data Collection in the ONE System



Data Collection

Accept the Referral/Project Enrollment (saw in previous section)

Client is enrolled and removed from the queue, they will not be considered for other openings.

Update Housing Move-in Date

Update the move-in date to show that client is no longer in the housing search process.

Annual Assessment

Complete an annual assessment when clients are enrolled in the project for a year. Assessments are completed within 30 days +/- the anniversary date.

Program Exit

Client has left the program, number of clients enrolled should not be greater than the no of beds.

Update Housing Move-in Date

1) Click on Programs Tab, and open the program enrollment

2) Select Enrollment


3) Update Housing Move-in Date

4) Save

Kiwi Fruit

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


PROGRAM HISTORY

Program Name	Start Date	End Date
 Rapid Rehousing Housing Test Agency	05/07/2019	Active
Street Outreach (Non-PATH) [TRAINING] HSH: SFHOT	03/27/2019	Active
Great Program [TRAINING] Always Awesome Agency	01/31/2018	Active

PROGRAMS: AVAILABLE

Enrollment History Provide Services Assessments Notes Files Chart Forms


Enroll Program for client Test Test

Project Start Date 01/25/2019 

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 

LIVING SITUATION

Annual/Status Assessment

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 X 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 Wile

Head of Household: Jane Test

Program Group Members

Luke Test 08/07/18 Active

Status Assessments +

No statuses

Assessment due every year
Notification: OFF ☐

ADD PROGRAM ASSESSMENT

Jane Test Mother

Luke Test Son

ADD STATUS ASSESSMENT ADD ANNUAL ASSESSMENT

Remember to enter notes and service!

Program Exit

- 1) Edit Program
- 2) Choose Exit
- 3) Enter Exit Date and Destination
- 4) Most fields fill out automatically
- 5) Save and Close

The image displays two screenshots of a web application interface for managing programs.

Top Screenshot: The 'PROGRAM: HOUSING PROGRAM' page is shown with the 'History' tab selected. A red arrow points to the 'Exit' link in the top right corner of the tab bar.

Bottom Screenshot: The 'End Program for client Wendy Wilson' form is shown. A red arrow points to the 'Project Exit Date' field, which is currently empty. Below it, the 'Destination' field is set to 'Select'. The 'Is the Program Type a Permanent Housing Program Type?' field is set to 'Yes (Automatically Generated Response)'. The 'Housing Move-In Date' field is set to '11/01/2018'. The 'Disabling Condition' field is set to 'Yes', and the 'Physical Disability' field is set to 'No'.

Reporting in the ONE System



Referral Statistics Report

- 1) Click on the launcher
- 2) Select Reports
- 3) Click the **Community and Referrals** drop down
- 4) Find the [RFRL-101] Referral Statistics report and click run
- 5) Select Inbound to generate a list of incoming referrals to your agency

The screenshot displays the [TRAINING] Always Awesome Agency dashboard. The top navigation bar includes the agency name, a user profile for Janel Fletcher, and a notification icon. Below the navigation bar, the 'REPORT LIBRARY' tab is active, showing a list of report categories. A dropdown menu is open, highlighting the 'REPORTS' option. The main content area lists various report categories with their respective counts: HUD Reports, Housing, Service Based Reports (14 report(s)), Administrator Reports (4 report(s)), Email Reports (6 report(s)), Program Based Reports (23 report(s)), Agency Management (3 report(s)), and Community and Referrals (6 report(s)). The 'Community and Referrals' category is expanded, showing the '[RFRL-101] Referral Statistics' report. A 'RUN' button is visible next to the report name, and a 'SCHEDULE' button is also present.

Report Category	Count
HUD Reports	
Housing	
Service Based Reports	14 report(s)
Administrator Reports	4 report(s)
Email Reports	6 report(s)
Program Based Reports	23 report(s)
Agency Management	3 report(s)
Community and Referrals	6 report(s)

[RFRL-101] Referral Statistics

RUN SCHEDULE

Solutions to Common Problems



Household is enrolled but still showing on my Pending tab or on CQ

Possible Cause: Enrollment wasn't connected to the referral

Solution: Contact Helpdesk to connect referral.

Prevention: Look for pending referral when enrolling, and select “Program Placement a result of referral.”

The screenshot shows a web form for enrolling a household. It features several sections and buttons:

- Program Placement:** A section on the left with a blue toggle switch and the text "Program Placement a result of Referral provided by Sarah Agency". This section is highlighted with a red box.
- Include group members:** A section in the middle with two entries: "Baby Smith" and "Jody Smith", each with a blue toggle switch.
- Pending Referrals:** A box on the right containing the text "1 pending referral(s). Oldest 0 days." This box is highlighted with a red box.
- Navigation:** At the bottom left, there are two links: "PRINT DIRECTIONS" (with a printer icon) and "DOC REQUIREMENTS" (with a document icon).
- Enroll Button:** A large blue button labeled "ENROLL" is located at the bottom right, highlighted with a red box.

HoH is enrolled but family members are missing from enrollment

Possible Cause: Skipped enrolling family members

Solution: Add family members to enrollment

PROGRAM: RRH PROGRAM

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

Program Service History LINK FROM HISTORY

Service Name	Start Date	End Date
Referral: RRH Program Sarah Agency referral to Sarah Agency	03/19/2018	03/01/2018

18 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 03/01/2018

Assigned Staff: Stacy Holmes ☒

Head of Household: Michael Jones ☒

Program Group Members

No active members

Prevention: When enrolling, select applicable family members under “Include group members.”

☒ Program Placement a result of Referral provided by Sarah Agency

Include group members:

☒ Baby Smith

☒ Jody Smith

1 pending referral(s). Oldest 0 days.

PRINT DIRECTIONS DOC REQUIREMENTS

ENROLL

I found out my client is housed but might still be on the CQ

How to tell: Check the History tab for a CQ Referral with an end date of Pending.

Solution: Contact the Helpdesk to have them removed from CQ.

Jelly Bean

PROFILE

HISTORY

PROGRAMS

ASSESSMENTS

NOTES


FILES

LOCATION

HISTORY

Advanced Search Options

View

Service Name	Start Date	End Date	
<div>Referral: Community Queue</div> <div>Sarah Agency referral to Community Queue</div>	04/02/2018	Pending	

Resources

ONESF Help Center Website

<https://onesf.clarityhs.help>

Bitfocus Helpdesk

onesf@bitfocus.com

415.429.4211