

Rapid Re-Housing

**ONE System Training
May 26, 2020**



Welcome Back



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AGENDA

Coordinated Entry

- Post Openings
- Managing Referrals
- Notes within the referral

Data Elements/Entry

- Enrollment Date vs. Housing Move-in Date
- Project Exit
- Services & Notes within the client chart

Data Collection In The ONE System:

- Annual Assessments

Solutions to Common Data Errors

Data Quality & Helpful Reports

Resources

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

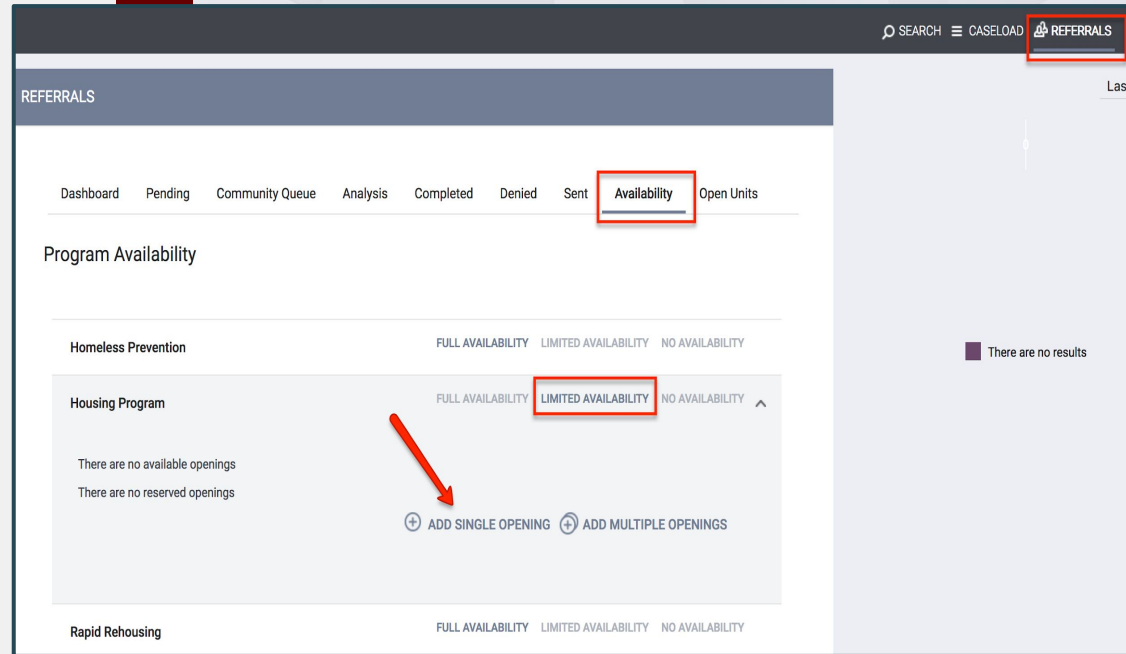
Filling out all fields is important to make sure Access Points have enough information to make an appropriate referral



Bitfocus

How to Post 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



ADD AN OPENING

Date

Date the unit is available

25

Additional Notes

Unit Number

←

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)

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: Family

☐

ADA Unit

☐

Chron A

☐

HDAP

☐

MHSA

☐

Access Point Staff Responsible for Filling Opening (Field for AP use only)

SAVE CHANGES

CANCEL

Label:

- Be Sure to include a unique label for all openings --even those that don't have a unit number (i.e. RRH)

Indicate Population:

- Providers/ Property Managers must indicate what population the resource can serve

Referral Notifications

- **Providers will receive a notification via email when a referral has been sent**
 - Providers will also 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

Step 1: Go to Referrals Tab

Step 2: Select The Pending Tab

Step 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 Sort By Default

☐ Eligible Clients Only

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

Pending-In Process

[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

- 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

Referral Notifications

- **“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

- When a Status is Changed, the color of the referral will also change
- “In-Process Notifications”- are 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

Characteristic


-- Select --

Sort By

Default

☐ Eligible Clients Only

SEARCH

Client	Referral Date	Qualified	Days Pending
Raz Berry Program: Berkely RRH Referred by: [TRAINING] Bayview Access Point	01/28/2018	Reassigned	682 total 0 pending
Earl Sweatshirt Program: Haight Street Apartments Referred by: [TRAINING] San Francisco Youth Coordinated Entry Agency	 04/17/2019	Reassigned	238 total 0 pending 203 in process

Denying A Referral

- Making a determination as soon as possible

- Select the 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 <button>CHECK-IN</button>
Status	Denied ▼
Send to Community Queue	-- Select -- ▼
Denied Reason	Select ▼
Denied Message	<input type="text"/>
Private	<input type="checkbox"/>
<div><button>SAVE CHANGES</button><button>CANCEL</button></div>	

***** when you deny a referral the unit will automatically repost***

Accepting Referrals

100% Available 0% Referrals Denied

 **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

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

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

New Services

RRH Providers will now see new COVID-19 Related Services such as:

- **RRH_COVID19_Financial Coaching**
- **RRH_COVID19_Full Subsidy**
- **RRH_COVID19_Housing Search Extension**



Services

RRH Providers will now see new COVID-19 Related Services



Bitfocus Test

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

Your changes have been saved successfully.

PROGRAM: RISING UP-3RD STREET YOUTH CENTER AND CLINIC

[Enrollment](#) [History](#) [Provide Services](#) [Assessments](#) [Notes](#) [Files](#) [Forms](#)

× Exit


Services

Full/Part-Time Unsubsidized Employment	Employment ▾
Document Ready	Housing Search and Placement ▾
Education Services	Education ▾
Housing Search	Housing Search and Placement ▾
Refused Housing Referral	Housing Search and Placement ▾
RRH_COVID19_Financial Coaching	Case Management ▾
RRH_COVID19_Full Subsidy	Rental Assistance ▾
RRH_COVID19_Housing Search Extension	Housing Search and Placement ▾
Workforce Development Program	No Category ▾

Services

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Berkeley 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: BERKELEY 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	▼

To Access Services:

- Click the “Program” tab
- Open the program enrollment
- Click “Provide Service”
- Click the drop down next to the service provided

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



Enter Case Note

SUBMIT

Notes within the Notes Tab

- Notes are entered under the notes tab after the client is enrolled in the RRH program and Exited from Coordinated Entry
- Notes allow for information to be shared with other users including access point staff
- Notes are entered when there is no applicable service to record
- Notes Under this tab may include:
 - Case Management Notes
 - Financial Assistance
 - Eviction Notice

Notes within the Notes Tab

Step 1: Click the “Notes” tab

Step 2: Click Add Note

Step 3: Type in title, adjust date if necessary

Step 4: Type note

Step 5: Click “Save Changes”

The screenshot displays the Bitfocus web application interface. At the top, a navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, **NOTES** (highlighted with a red box), FILES, CONTACT, and LOCATION. Below this, a header section for 'CLIENT NOTES' features an 'ADD NOTE (+)' button (also highlighted with a red box). The main content area shows a message 'There are no results to display'. A modal form for adding a new note is open, containing the following fields: 'Title' (empty), 'Agency' (set to 'Five Keys Charter Schools & Programs'), 'Date' (set to '08/06/2019' with a calendar icon), and 'Note' (a large text area with a rich text editor toolbar). The form also includes a 'Time Tracking' section with 'Select' dropdowns and a 'Private' toggle switch. At the bottom of the modal are 'SAVE CHANGES' and 'CANCEL' buttons. A red horizontal line is drawn across the middle of the slide, separating the text steps from the interface screenshot.

Data Collection In the ONE System

Data Collection

Accept the Referral/Project Enrollment (as seen in previous section)

When a 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 the 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 number 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: SPHOT	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 Assessments & Status Assessments

Annual Assessments & Status Assessments

- Add an annual assessment every year within +/- 30 days of enrollment anniversary.
 - Add a status assessment if client income information changes.
1. Programs tab
 2. Open the program enrollment
 3. Add Status Assessment
 4. Choose Annual or Status
 5. Fill out the screen and save

The screenshot displays the 'PROGRAM: BRINGING FAMILIES HOME' interface. The main content area shows the 'History' tab with a 'Program Service History' section that currently has no results. A red arrow points to the 'Status Assessments' link in the right sidebar, which is labeled '2 DAYS ACTIVE PROGRAM'. Below this, the 'Program Group Members' section lists 'Luke Test' as 'Active' on '08/07/18'. The 'Status Assessments' section shows 'No statuses' and a notification that 'Assessment due every year' with a checkbox for 'Notification: OFF'.

An 'ADD PROGRAM ASSESSMENT' modal is open in the foreground. It features two rows of assessment options, each with a toggle switch, a name, and a role:

Toggle	Name	Role
<input checked="" type="checkbox"/>	Jane Test	Mother
<input checked="" type="checkbox"/>	Luke Test	Son

At the bottom of the modal, there are two buttons: 'ADD STATUS ASSESSMENT' (highlighted with a red box) and 'ADD ANNUAL ASSESSMENT'.

Program Exits

1) Go Program Tab click edit button

2) Choose Exit

3) Enter Exit Date and Destination

4) Most fields fill out automatically

5) Save and Close

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

PROGRAM: HOUSING PROGRAM

Enrollment **History** Provide Services Notes Chart Forms [× Exit](#)

Program Service History

There are no results to display

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

PROGRAM: HOUSING PROGRAM

Enrollment History Provide Services Notes Chart Forms [× Exit](#)

End Program for client Wendy Wilson

Project Exit Date [×](#)

Destination

Is the Program Type a Permanent Housing Program Type?

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date [×](#)

DISABLING CONDITIONS AND BARRIERS

Disabling Condition

Physical Disability

Solutions to Common Mistakes in ONE

The household is enrolled, but still showing on my Pending tab or on Community Queue

Possible Cause: The Enrollment wasn't connected to the referral

Solution: Contact Helpdesk (onesf@bitfocus.com) to connect referral.

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

<input checked="" type="radio"/> Program Placement a result of Referral provided by Sarah Agency	<p>Include group members:</p> <p><input checked="" type="radio"/> Baby Smith</p> <p><input checked="" type="radio"/> Jody Smith</p>	1 pending referral(s). Oldest 0 days.
PRINT DIRECTIONS DOC REQUIREMENTS		ENROLL

How to tell: Check the History tab for a CQ Referral with an end date of Pending and that the actual enrollment has the chain link

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

HISTORY				
Advanced Search Options View ▾				
Service Name		Start Date	End Date	
	Rising Up-Five Keys Schools and Programs Five Keys Charter Schools & Programs	09/27/2019	Active	
	Referral: Rising Up-Five Keys Schools and Programs San Francisco Youth Coordinated Entry Agency referral to Five Keys Charter Schools & Programs	 09/13/2019	09/27/2019	

HoH is enrolled but family members are missing from the enrollment

Possible Cause: Skipped enrolling family members

Solution: Add family members to enrollment

PROGRAM: RRH PROGRAM

Enrollment History Provide Services Assessments Notes Files Forms x 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 member

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

ONE System Reports



Referral Statistics Report

The screenshot shows the user interface of the [TRAINING] Always Awesome Agency. At the top, the user is Janel Fletcher. The main navigation bar includes 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. A dropdown menu is open, showing 'MANAGE', 'REPORTS' (highlighted with a red box and number 2), and 'CALENDAR'. The left sidebar lists various report categories: 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 highlighted with a red box and number 3. Below this, the specific report '[RFRL-101] Referral Statistics' is selected. At the bottom, there are 'RUN' (highlighted with a red box and number 4) and 'SCHEDULE' buttons.

- 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

Referral Statistics Report

- Number of referrals received by an agency
- Status of referrals (Pending, In-Process, Accepted, or Denied)

Referral Statistics

Agency: Sara's Test Agency
 Dates Between: 10/01/2018 and 01/31/2019
 Referral Direction: inbound
 Referral Status: Referred

Referral Date	Unique Identifier	Client Name	Program Name	Days Pending
11/30/2018	F32DE8A0A	Brady, Tom	Blue Sky RRH From agency: Sarah Smith Housing Services To agency: Sara's Test Agency	61
12/26/2018	4D217D954	Pie, Apple	Blue Sky RRH From agency: Sara's Test Agency To agency: Sara's Test Agency	35

Total: 2

Thu Jan 31 07:50:41 AM 2019

Referral Statistics

Dates Between:
Referral Direction:

AgencyName
04/01/2017 and 07/31/2017
inbound

Number of Agency referrals received	14
Pending Referrals	
Number of pending referrals	0
Oldest pending referral in days	0
Newest pending referral in days	0
Average pending referral in days	0
Pending - In Process Referrals	
Number of pending referrals	2
Oldest pending referral in days	22
Newest pending referral in days	22
Average pending referral in days	22
Completed Referrals	
Number of referrals resulting in Program enrollment	6
Longest time to connect referral in days	61
Shortest time to connect referral in days	0
Average time to connect referral in days	30
Denied Referrals	
Number of denied referrals	6
Longest time to deny a referral in days	3
Shortest time to deny a referral in days	0
Average time to deny a referral in days	1
Breakdown Of Most Common Denied Referral Reasons	
Lack of Eligibility	2
Full Capacity/No Availability	1
Client refused services	2
Self Resolved - Client Housed	1

Breakdown Of Referred Programs

NOTE: P - Pending; P / I - Pending - In process; A - Accepted; D - Denied.

Services Only					
Agency Name	Program Name	P	P / I	A	D
AgencyName	ProgramName	0	2	1	1
Transitional Housing					
Agency Name	Program Name	P	P / I	A	D
AgencyName	ProgramName	0	0	2	1
AgencyName	ProgramName	0	0	1	3
AgencyName	ProgramName	0	0	0	1
AgencyName	ProgramName	0	0	1	0
AgencyName	ProgramName	0	0	1	0

Resources

ONESF Help Center Website
<https://onesf.clarityhs.help>

Bitfocus Helpdesk
onesf@bitfocus.com
415.429.4211

