SF HOT User Manual:
The Quick PATH to Success
Version – 1

Table of Content

ONE/Bitfocus Quick References

Websites
- Clarity (ONE) Login: https://onesf.clarityhs.com/login
- BitFocus/ONE Helpdesk Site: https://onesf.clarityhs.help/hc/en-us

Helpdesk Contact
- Phone Number: +1-415-429-4211
- Email: onesf@bitfocus.com
- Website: https://onesf.clarityhs.help/hc/en-us/requests/new

General Guides
- Report Library Guide: https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library
- General FAQs "How do I _____": https://get.clarityhs.help/hc/en-us/categories/115000086148-End-User
- Getting Started with Clarity: https://onesf.clarityhs.help/hc/en-us/categories/115002186008-Getting-Started
- ONESF Training Videos and Handouts https://onesf.clarityhs.help/hc/en-us/articles/115009555767-ONESF-Training-Videos-and-Handouts

What is the ONE System?

ONE
Online **N**avigation and **E**ntry system

Goal
A Homeless Response System designed to efficiently triage data and resources across multiple non-profit organizations under a central database.

What is PATH?

PATH
Project for **A**ssistance in **T**ransition from **H**omelessness

Funding Source
The Substance Abuse and Mental Health Services Administration (SAMHSA), Center for Mental Health Services (CMHS).

Goal
Reduce or eliminate homelessness for individuals with serious mental illnesses or co-occurring serious mental illness and substance use disorder

Data Collection into the ONE System
The data collection process is designed to support PATH projects as they connect to individuals and families that are experiencing homelessness, and as relationships are built between the street outreach worker and the client.

Note: This manual will only cover the **steps** to accomplish enrollment and registration. For additional information on PATH overviews, referrals, and data point collection – please request for a '**SFHOT PATH Data Collection Training**" document from onesf@bitfocus.com

Section 1
Becoming the Chosen ONE
Registering as a new ONE user

Welcome to the world of **PATH** management! You have been chosen for a mission like no other. Before we can begin, you must complete a few quests first to gain access as a ONE System user:

1. Complete **2** Training Sessions
    a. Clarity General Training: https://onesf.clarityhs.help/hc/en-us
    b. SFDPH Privacy Training: https://101g-xnet.sfdph.org:8443/ords/vrdsn/f?p=111:81:::NO:81:P81_HETC_PROGRAM_PK,P81_PAGE_FROM:2420,12

2. Supervisor (Agency Lead) to **notify** Bitfocus upon training completion. You may complete this quest using the following options:
    a. Email: onesf@bitfocus.com
    b. Website: https://onesf.clarityhs.help/hc/en-us/requests/new

3. Once the above items are complete, you should receive your login credentials instructions via **e-mail** from Bitfocus

Section 2
Logging In
Computer + Tree Log = Logging In

Logging-In The "Classical" Way

If you want to experience the full scenic route, follow these steps:

1. Visit the Clarity Homepage: https://onesf.clarityhs.help/hc/en-us
2. On the bottom left hand of the screen, look for the "ONESF Login" and give it a click

3. You will be redirected to this login screen, type in the USERNAME and PASSWORD provided in your email

Logging-In The "Fast" Way

You might have already guessed it, just bookmark step 3:
https://onesf.clarityhs.com/login

Section 3
PATH Service Registration
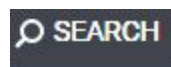Enrolling clients into PATH services

PATH - Part 1: Finding Clients and Adding Family Members

Step 1: Log In

Step 2: Search for existing clients

- Upper right hand navigation, select [SEARCH]

- In the text-field, type client's full name and select appropriate account
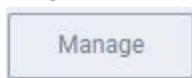

*TIP: You can also search by Social Security Number
**Client doesn't exist? Create one – follow this guide: <Insert Link>

Step 3: Adding family

- Right of the client profile, next to 'Household Members' select

- Search client's family member name(s) and select 'Join' to add them to Household

- Select the 'Member Type' and hit 'Save'

PATH - Part 2: Program Enrollment

Step 1: Top navigation, select

Step 2: Under , determine if the client lives in an area meant for human habitation:

A. If NO, select PATH Street Outreach

B. If <mark>YES</mark>, PATH Supportive Services

*To include family members, look for 'Include group members' and select the ⬤ next to their name.

NOTE:
All programs **without** an extra ( ) tag are **PATH** programs.
All programs labeled **(Non-PATH)** are **Non-PATH** programs

Step 3: Press [ENROLL]

Step 4: Complete enrollment form and select [SAVE & CLOSE]
  ● The 'Project Start Date' is the first date of contact

Step 5 (Optional, Check Program): Select [PROGRAMS]. Under [PROGRAM HISTORY] is the recently added program(s)

Program Name	Start Date	End Date	Type
PATH Street Outreach HSH: SFHOT	12/20/2018	Active	Individual

PATH - Part 3: Complete Assessments (Family Only)

Step 1: Top navigation, select [ASSESSMENTS]

Step 2: Under [ASSESSMENTS], complete the 'Shelter (Individual Room) Placement Criteria'
  ● Answer the following questions:
    ● "Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams?"

- "How many people do you have in your immediate family that are in need of shelter?"

*All other questions and assessments will be completed by the Access Points

Step 3: Press **SAVE**

Step 4: (Optional, Check Assessment): Top navigation, select **ASSESSMENTS**, under **ASSESSMENTS** is the recently added assessment(s).

	Assessment Name	Completed	Details	
🗑 ✎	Shelter (Individual Room) Placement Criteria HSH: SFHOT	12/20/2018		≔ ELIGIBILITY

PATH - Part 4: Updating Client's Location
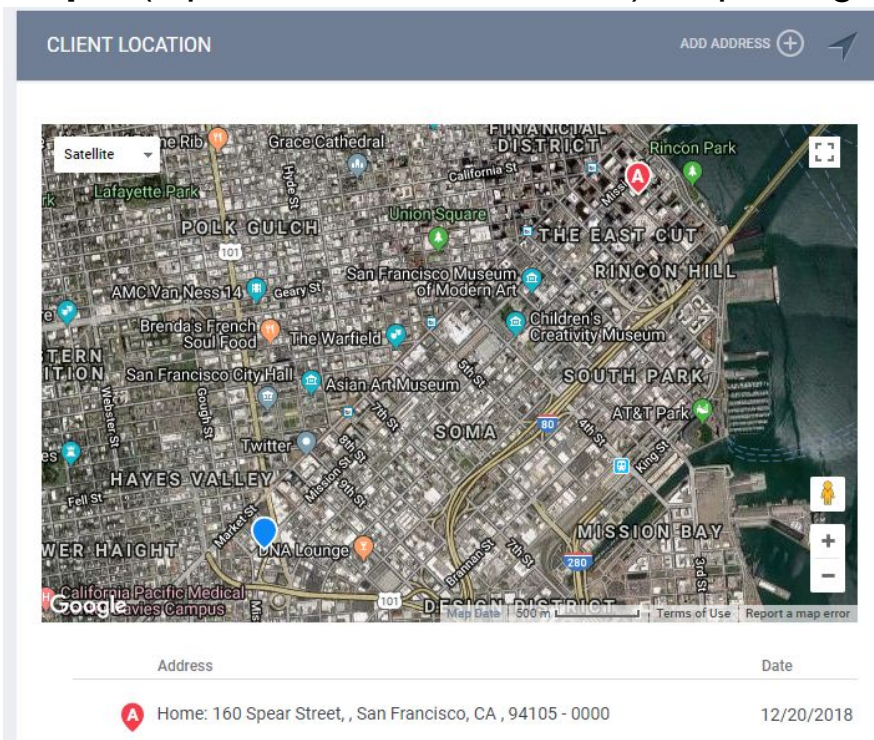
Step 1: Top navigation, select **LOCATION**

Step 2: Right of **CLIENT LOCATION** select **ADD ADDRESS ⊕**

Step 3: Fill out the form and press **ADD RECORD**

Step 4 (Optional, Check Location): Top navigation, select LOCATION .

CLIENT LOCATION   ADD ADDRESS ⊕

Address	Date
Ⓐ Home: 160 Spear Street, , San Francisco, CA , 94105 - 0000	12/20/2018

*Name = Description of Location. Example: Tent, Car, Friend's House
** Zipcode – If you don't know the zipcode, enter 00000
*** DO NOT select private toggle

PATH - Part 5: Outreach Contact Service
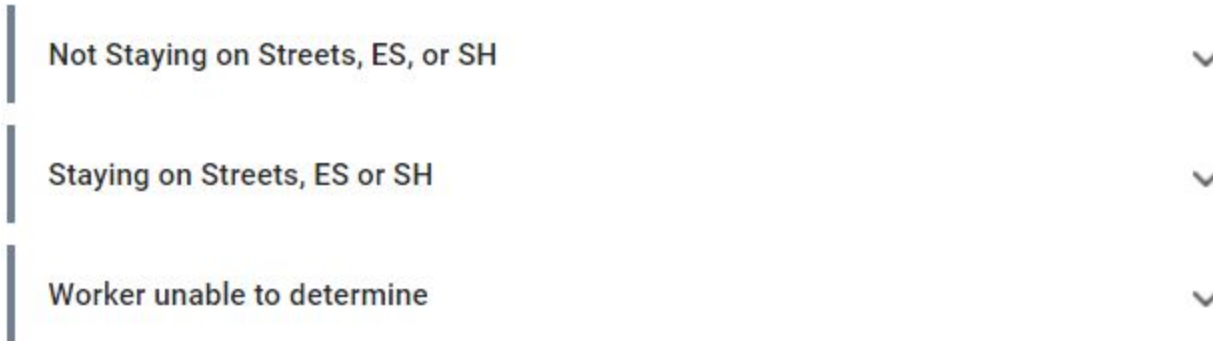
Step 1: Top navigation, select PROGRAMS

Step 2: Under PROGRAM HISTORY , find 'PATH Street Outreach' and select the notepad icon to edit.

Program Name

🗑 ✎   PATH Street Outreach
HSH: SFHOT

Edit

Step 3: Under PROGRAM: PATH STREET OUTREACH , select [PATH] Outreach Contact to activate the dropdown menu.
Then select one of the 3 appropriate options.

Not Staying on Streets, ES, or SH ⌄

Staying on Streets, ES or SH ⌄

Worker unable to determine ⌄

Press **SUBMIT** to confirm.

Step 4 (later):
Record a PATH Outreach Contact Service each time you meet client before Engagement.

Upper right, select ▦ and then press ATTENDANCE .

Select Edit for the appropriate service you want to record in.

PATH - Part 6: Date of Engagement

Step 1: Top navigation, select PROGRAMS

Step 2: Under PROGRAM HISTORY , find 'PATH Street Outreach' and select the notepad icon to edit.

Program Name

PATH Street Outreach
HSH: SFHOT

Edit

Step 3: Under PROGRAM: PATH STREET OUTREACH , select Enrollment

Step 4: Scroll down until you reach

COMPLETE PATH ENGAGEMENT DATE WHEN THE CLIENT HAS BEEN ENGAGED

Step 5: Fill out Date of Engagement ___/___/_____ 📅

Note: The 'Date of Engagement' is "The point at which an interactive client relationship results in a deliberate client assessment or the beginning of a case plan"

PATH - Part 7: Date of Status Determination

Step 1: Top navigation, select PROGRAMS

Step 2: Under PROGRAM HISTORY , find 'PATH Street Outreach' and select the notepad icon to edit.

Program Name

🗑 ✏ PATH Street Outreach
HSH: SFHOT

Edit

Step 3: Under PROGRAM: PATH STREET OUTREACH , select Enrollment

Step 4: Scroll down until you reach

COMPLETE DATE OF STATUS DETERMINATION WHEN THE ENROLLMENT STATUS FOR THE CLIENT HAS BEEN DETERMINED

Step 5: Fill out Date of Status Determination   __/__/____   📅

Note: The 'Date of Status Determination' is "The point at which the PATH-funded worker can determine if a person is eligible for the PATH program. Only persons eligible for PATH can receive a PATH-funded service or referral."

PATH - Part 8: Record PATH Services and Referrals

Step 1: Top navigation, select PROGRAMS

Step 2: Under PROGRAM HISTORY, find 'PATH Street Outreach' and select the notepad icon to edit.

Program Name

🗑 ✎ PATH Street Outreach
HSH: SFHOT

[Edit]

Step 3: Under PROGRAM: PATH STREET OUTREACH, select Provide Services

Step 4: Select any of the appropriate services and hit SUBMIT

PATH - Part 9: Exit Client from Program(s)

Step 1: Search for client

Step 2: Top navigation, select PROGRAMS

Step 3: Under PROGRAM HISTORY , find the program you want to exit and select the notepad icon to edit.

Program Name

PATH Street Outreach
HSH: SFHOT

Edit

Step 4: Under PROGRAM: PATH STREET OUTREACH , look to the far right and select ✕ Exit

*Note: If no service in **90** days, client is **automatically** exited*

Section 4
Non-PATH Service Registration
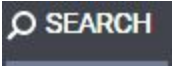## Enrolling clients into Non-PATH services

NOTE: Non-PATH instructions are identical to PATH steps (Section 3), so fear not this is just a repeat!

Non-PATH - Part 1: Finding Clients and Adding Family Members

Step 1: Log In

Step 2: Search for existing clients

- Upper right hand navigation, select **🔍 SEARCH**
- In the text-field, type client's full name and select appropriate account
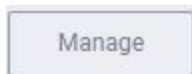

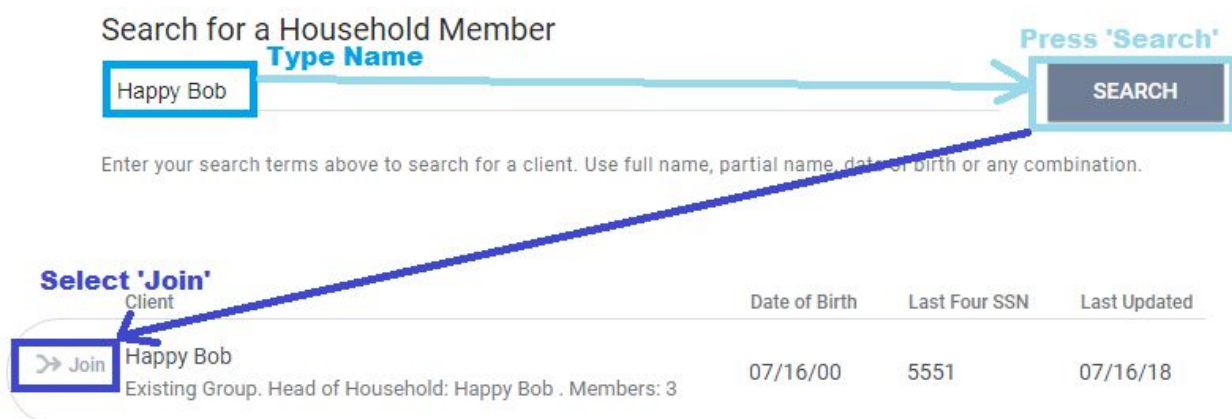*TIP: You can also search by Social Security Number
**Client doesn't exist? Create one – follow this guide: <Insert Link>

Step 3: Adding family

- Right of the client profile, next to 'Household Members' select

  Manage

- Search client's family member name(s) and select 'Join' to add them to Household

- Select the 'Member Type' and hit 'Save'

Non-PATH - Part 2: Program Enrollment

Step 1: Top navigation, select **PROGRAMS**

Step 2: Under **PROGRAMS: AVAILABLE** , determine if the client lives in an area meant for human habitation:
   A. If NO, select PATH Street Outreach
   B. If YES, PATH Supportive Services

*To include family members, look for 'Include group members' and select the ⬤ next to their name.

NOTE:
All programs **without** an extra ( ) tag are **PATH** programs.
All programs labeled **(Non-PATH)** are **Non-PATH** programs

Step 3: Press **ENROLL**

Step 4: Complete enrollment form and select **SAVE & CLOSE**
   • The 'Project Start Date' is the first date of contact

Step 5 (Optional, Check Program): Select **PROGRAMS**. Under **PROGRAM HISTORY** is the recently added program(s)

Program Name	Start Date	End Date	Type
Street Outreach (Non-PATH) HSH: SFHOT	12/24/2018	Active	Individual

Non-PATH - Part 3: Complete Assessments (Family Only)

Step 1: Top navigation, select **ASSESSMENTS**

Step 2: Under ASSESSMENTS , complete the 'Shelter (Individual Room) Placement Criteria'
- Answer the following questions:
  - "Has this family been verified unsheltered by SFHOT or Access Point Outreach Teams?"
  - "How many people do you have in your immediate family that are in need of shelter?"

*All other questions and assessments will be completed by the Access Points

Step 3: Press SAVE

Step 4: (Optional, Check Assessment): Top navigation, select ASSESSMENTS , under ASSESSMENTS is the recently added assessment(s).

	Assessment Name	Completed	Details	
🗑 ✏	Shelter (Individual Room) Placement Criteria HSH: SFHOT	12/20/2018		≔ ELIGIBILITY

Non-PATH - Part 4: Updating Client's Location
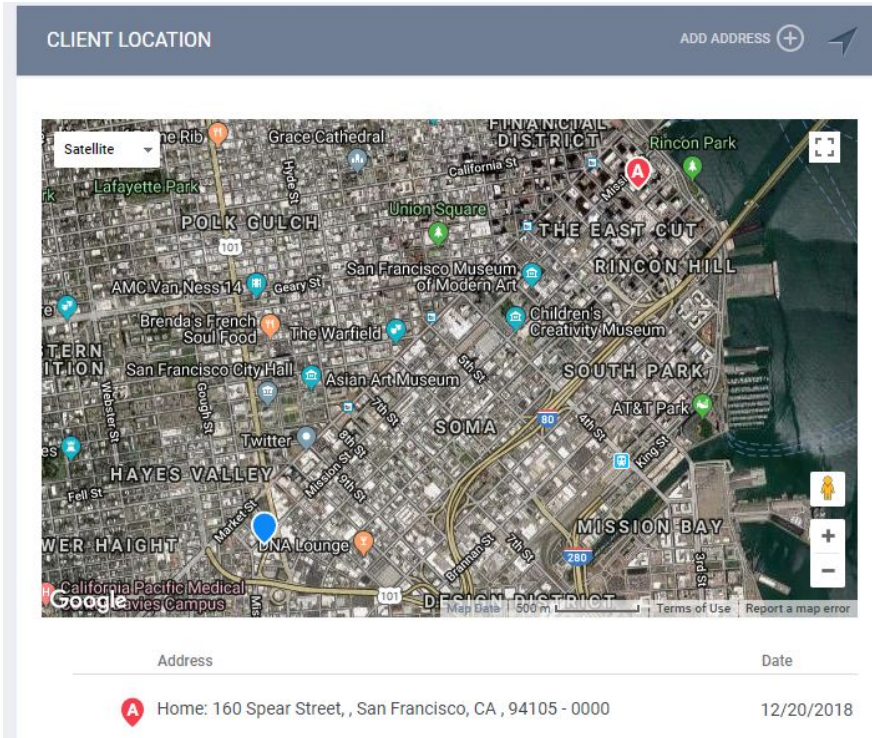
Step 1: Top navigation, select LOCATION

Step 2: Right of CLIENT LOCATION select ADD ADDRESS ⊕

Step 3: Fill out the form and press ADD RECORD

Step 4 (Optional, Check Location): Top navigation, select LOCATION .

*Name = Description of Location. Example: Tent, Car, Friend's House
** Zipcode – If you don't know the zipcode, enter 00000
*** DO NOT select private toggle

Non- PATH - Part 5: Outreach Contact Service

Step 1: Top navigation, select PROGRAMS

Step 2: Under PROGRAM HISTORY , find 'Street Outreach (Non-PATH)' and select the notepad icon to edit.

	Service Name	Start Date	End Date
✐	Street Outreach (Non-PATH) HSH: SFHOT	12/27/2018	**Active**

Step 3: Click "Provide Services". Click "Outreach Contact" and complete the fields.

Step 4: **"**Click Submit".

Step 5: If the client is offered Congregate Shelter and declines, record the service by clicking the drop down arrow next to "Declined Offer to Congregate Shelter".

Step 6 (recurring): Record a Outreach Contact Service (Non-PATH) each time you meet client before Engagement.
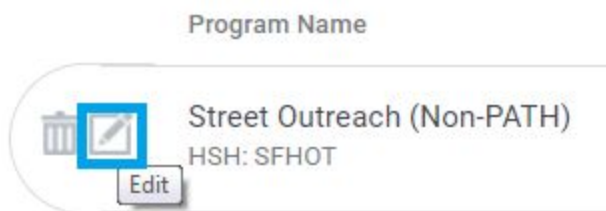
Upper right, select and then press ATTENDANCE.

Select for the appropriate service you want to record in.

Non-PATH - Part 7: Exit Client from Program(s)

Step 1: Search for client

Step 2: Top navigation, select PROGRAMS

Step 3: Under PROGRAM HISTORY, find the program you want to exit and select the notepad icon to edit.

Step 4: Under PROGRAM: STREET OUTREACH (NON-PATH), look to the far right and select ✕ Exit

*Note: If no service in **90** days, client is **<u>automatically</u> exited***

Updated: 04/22/2019