



# ONE System Toolkit for Scattered Site Programs

This toolkit can be used as a guide for the entire housing referral workflow for staff who work in scattered site housing programs. Each task has its own tip sheet with step-by-step instructions. There are also some additional topics and resources to support your work.

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### Referral Workflow

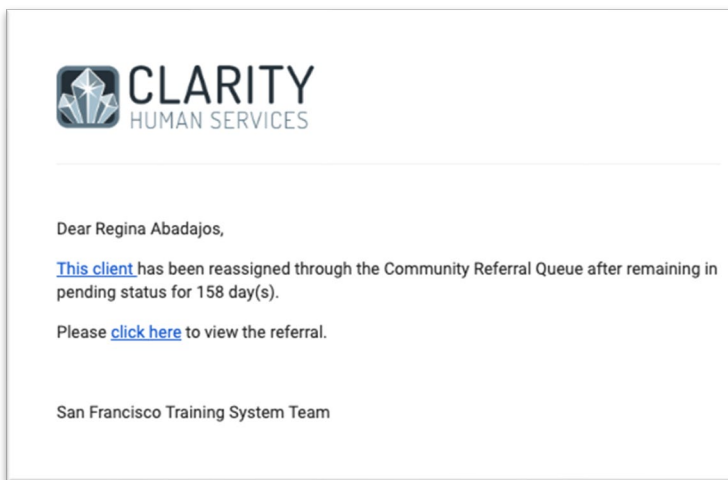
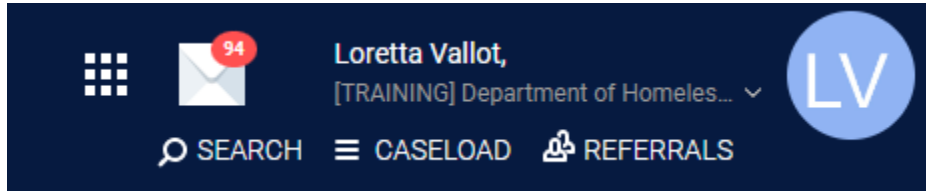
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## Processing and Accepting Referrals

The first step of accepting a new household to your program is to process the referral. You will receive an automatic notification via email and Clarity inbox when a referral has been sent to a program.



Referrals are processed from **REFERRALS** dashboard on the homepage. Referrals will be editable through **Pending** tab.

REFERRALS

DashboardPendingCommunity QueueAnalysisCompletedDeniedSentAvailabilityOpen Units

Pending Referrals

Search

ModeStandard

Sort ByDefault

Characteristic-- Select --

Eligible Clients Only

SEARCH

| Client  | Referral Date                     | Qualified  | Days Pending             |
|---|-----------------------------------|------------|--------------------------|
| <div>Tina Test1</div> <div>Program: HSH Staff Test Program - HSH Funding</div> <div>Referred by: [TRAINING] Department of Homelessness and Supportive Housing</div> | 03/23/2023                        | No         | 166 total<br>166 pending |
| <div>Jane Doe</div> <div>Program: Camelot Hotel - GF</div> <div>Referred by: [TRAINING] Department of Homelessness and Supportive Housing</div>                     | 04/04/2023                        | Reassigned | 154 total<br>154 pending |
| <div>Problem Solving Queen</div> <div>Program: Camelot Hotel - GF</div> <div>Referred by: [TRAINING] Department of Homelessness and Supportive Housing</div>        | <div><div></div></div> 04/07/2023 | Reassigned | 151 total<br>151 pending |

To acknowledge the referral and mark it received, the status in ONE needs to be changed from **Pending** to **Pending-In Process**. This task is usually completed by service providers. This will notify other users, including Access Point staff and HSH staff, that the referral has been received and is in process. If the referral is not changed to Pending-In Process, the referral will automatically expire, and the client will be sent back to the Community Queue in 180 days.

REFERRAL: EDIT

|                      |   |
|----------------------|---|
| Client               | Samuel Test   |
| Referred Program     | BVHP-Rapid Rehousing-Prop C   |
| Referred to Agency   | [TRAINING] Bayview Hunters Point Foundation for Community Improvement                             |
| Referring Agency     | [TRAINING] San Francisco Adult Coordinated Entry Agency   |
| Referred Date        | 05/01/2023 4:18 PM  |
| Days Pending         | 0 day(s)  |
| In Process           | 0 day(s)  |
| Qualified            | Reassigned  |
| Adult Priority score | 99  |
| Referred by Staff    | Holly Aversano ⓘ  |
| Case Manager         | Select ▾  |
| Last Activity        | 05/01/2023 <div>CHECK-IN</div>  |
| Status               | <div><div>✓ Pending</div><div>Pending - In Process</div><div>Denied</div><div>Expired</div></div> |
| Private              |   |

SAVE CHANGES

CANCEL

Referral color will change to green when status is changed to **Pending-In Process**

Samuel Test

Program: BVHP-Rapid Rehousing-Prop C

Referred by: [TRAINING] San Francisco Adult Coordinated Entry Agency ⓘ



## Denying Referrals

When you need to deny a referral, change the status of the referral to **Denied**. Four additional fields will populate that need to be answered to identify the denial reason.

Status: Denied

Send to Community Queue: -- Select --

Denied By Type: -- Select --

Denied Reason: Select

Denial Information:

Private: ☐

SAVE CHANGES CANCEL

## Program Enrollments

Once the household has agreed to be a part of the program, the next step is to enroll the household in the program. Enrolling a client into your program accepts the Community Queue referral. Click the **PROGRAMS** tab and find the program that the household was referred to. There should be an orange box identifying that there is a pending referral to this program. Ensure the toggle that says 'Program Placement is the result of Referral' is on.

If there are other members in the household, include those household members who are moving in by toggling their names ON. Doing so is essential to ensuring that the household can be placed in a unit together. This task is usually completed by the service provider.

**Samuel Test**

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

CLIENT PROFILE

---

**BVHP-Rapid Rehousing-Prop C**

Program Description:  
Adult households reside in a unit in the private rental market. This is a temporary subsidy, up to two years. Household rent contributions will increase over time. The household is expected to take over the entire rental amount at the end of subsidy term.

**Active Clients**

3 CLIENTS

- 0 % Families
- 100 % Individuals

**Occupancy (Today)**

3 UNITS

- 9 % Checked In
- 0 % Reserved
- 91 % Available

**Referrals (90 Days)**

1 REFERRAL

- 100 % Referrals Pending
- 0 % Referrals Connects
- 0 % Referrals Denied

**Funding Source**  
Local or Other Funding Source

**Availability**  
Full Availability

**Service Categories:**

- ✓ Case Management
- ✓ RETIRED (Coordinated Entry Event)
- ✓ Housing Search and Placement
- ✓ Other

**HOUSING AVAILABILITY:**

► Households without children 35 Beds in 35 Units

1 pending referral(s). Oldest 0 days.

☒ Program Placement a result of Referral provided by [TRAINING] San Francisco Adult Coordinated Entry Agency

PRINT DIRECTIONS

ENROLL

The project start date is the date the household begins housing navigation services. Leave the housing move in date blank until the household successfully moves into their unit.



Samuel Test

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

Enroll 'BVHP-Rapid Rehousing-Prop C' program for client Samuel Test

Program Date

05/01/2023

HOUSING LOCATION INFORMATION

Housing Location Provider

Select

CASE MANAGEMENT INFORMATION

Case Management Provider

Select

Case Management Status

Select

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

Housing Move-In Date

Unit Number

Address

City

Zipcode

Is this a shared housing destination?

PRIOR LIVING SITUATION

Type of Residence

Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

Length of Stay in Prior Living Situation

One night or Less

Approximate Date Homelessness Started

03/10/2023

Number of times on the streets, in ES, or Safe Haven in the past three years

One Time

When enrolling a client, please keep in mind that client information may cascade forward from other program enrollments. It is important to always confirm that all details are still up to date and accurate. Update information as necessary.



## Housing Move-In Date

---

When a household moves into their unit, record move-in date in ONE. This task is usually completed by the housing locator.

1. Click on 'PROGRAMS' tab
2. Click on the pencil icon to open the program
3. Click the "Enrollment" tab
4. Update housing move-in date, address, and shared housing toggle (if applicable)
5. Scroll down and click 'SAVE & CLOSE' to save changes



## Services

Services that are universal across scattered sites are outreach services.

- Outreach services
  - Use **Housing Search** to show that your program is working to outreach a client for initial contact, or that you are supporting the client through search of a home in the private rental market.
  - Use **Housing Search Hold** when a referral is in the housing search process and encounters barriers to housing that places the housing search process on hold.

Use the following steps to submit a service while within a program enrollment:

1. Click on Provide Services tab
2. Click on service name
3. Click on the appropriate service item
4. Adjust for appropriate date and write note
5. Click SUBMIT

The screenshot displays the 'Provide Services' tab in the ONE System Toolkit. The 'Housing Search Hold' service is selected, and the 'Service Name' field is highlighted. The 'Event Date' is set to 05/01/2023. The 'Service Note' field is empty. The 'SUBMIT' button is visible at the bottom right.





## Program Exits

When a household leaves your program, record the exit in ONE. Be sure to select any additional household members, by toggling the household member 'ON', who also need to be exited from the program. This task is usually completed by the service provider.

1. Click on 'PROGRAMS' tab
2. Click on the pencil icon to open the program
3. Click the 'Exit' button in the top right- hand corner
4. Review cascaded information for accuracy
5. Scroll down and click 'SAVE & CLOSE' to save changes

The screenshot displays the ONE System interface for a user named Samuel Test. The top navigation bar includes tabs for PROFILE, HISTORY, SERVICES, PROGRAMS (selected), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, the program name 'PROGRAM: BVHP-RAPID REHOUSING-PROP C' is shown. The main content area has sub-tabs: Enrollment, History (selected), Provide Services, Events, Assessments, Notes, Files, and Forms. In the top right corner of the main content area, there is a button labeled 'X Exit' which is highlighted with a green border. Below the sub-tabs, the 'Program Service History' section is visible, showing a table with columns for Service Name, Start Date, and End Date. A single entry is listed: 'Referral: BVHP-Rapid Rehousing-Prop C [TRAINING] San Francisco Adult Coordinated Entry Agency referral to [TRAINING] Bayview Hunters Point Foundation for Community Improvement' with a start date of 05/01/2023 and an end date of 05/01/2023. At the bottom left, there are checkboxes for Reservation, Service, and Referral, with Referral being selected.

| Service Name   | Start Date | End Date   |
|--|------------|------------|
| Referral: BVHP-Rapid Rehousing-Prop C<br>[TRAINING] San Francisco Adult Coordinated Entry Agency referral to [TRAINING] Bayview Hunters Point Foundation for Community Improvement | 05/01/2023 | 05/01/2023 |



## Annual Assessments

Complete annual assessments yearly to update client information that may have changed since enrollment. This task is to be done by the service provider:

1. Click 'PROGRAMS' tab
2. Click on the pencil icon to open the program
3. Click on the 'Assessments' tab
4. Click the 'START' button on the Annual Assessment
5. Update information in the assessment
6. Click 'SAVE & CLOSE' at the bottom of the assessment to save

**Samuel Test**

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

Emergency Shelter - Entry Exit 05/01/2023 **Active** Individual  
United Living International ⓘ

Verona - GF  
PH - Housing with Services (no disability required for entry) 04/05/2023 04/05/2023 Individual  
[TRAINING] Abode Services ⓘ

**BVHP-Rapid Rehousing-Prop C**  
PH - Rapid Re-Housing 04/01/2023 **Active** Individual ⓘ  
[TRAINING] Bayview Hunters Point Foundation for Community Improvement ⓘ

**Samuel Test**

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

PROGRAM: BVHP-RAPID REHOUSING-PROP C

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

**Assessments** LINK FROM ASSESSMENTS

Status Update Assessment **START**

Annual Assessment **START**



## Report Library

For providers serving our unhoused and housed neighbors, some reports in the Report Library can ensure data quality being present, consistent, accurate, and timely. Both service providers and housing locators are responsible for ensuring the data in ONE is accurate. Although it may not be immediately visible in the day-to-day workflow, data quality impacts the effectiveness of the Homelessness Response System's work in many ways. When we do not have timely, high-quality data in ONE, it hinders HSH and the Homeless Response System's ability to serve clients equitably and effectively. The Program Roster is a highly used report for scattered site programs to ensure accurate data quality.

The screenshot displays the ONE System Toolkit interface. At the top, a dark blue header bar contains the user profile 'Test User, Housing Test Agency' and a circular icon with 'TU'. Below this, a navigation bar shows 'CASELOAD' and 'REFERRALS'. A dropdown menu is open, showing 'REPORTS' and 'CALENDAR'. The 'REPORTS' option is highlighted with a green box. Below the dropdown, the 'REPORT LIBRARY' section is visible, listing various report categories with their respective counts. A green arrow points to the 'Program Based Reports' category.

| REPORT LIBRARY           |                |
|--------------------------|----------------|
| Favorite Reports         | 4 report(s) ▼  |
| Data Quality Reports     | 6 report(s) ▼  |
| Administrator Reports    | 19 report(s) ▼ |
| Service Based Reports    | 13 report(s) ▼ |
| Program Based Reports    | 19 report(s) ▼ |
| Assessment Based Reports | 4 report(s) ▼  |
| Profile Screen Reports   | 1 report(s) ▼  |
| Housing                  | 5 report(s) ▼  |
| HUD Reports              | 7 report(s) ▼  |
| Community and Referrals  | 8 report(s) ▼  |
| Agency Management        | 4 report(s) ▼  |



| Program Roster Report   |                   |            |              |             |             |            |     |   |   | Demo Agency |    |                             |   |
|---|-------------------|------------|--------------|-------------|-------------|------------|-----|---|---|-------------|----|-----------------------------|---|
| Active within [12/01/2019 - 11/30/2020]   |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Housing Move-in: Undefined = Unknown HoH or Move-in is Null, <input type="checkbox"/> = Non PH Project, A: Assessments, S: Services, CN: Case Notes |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Client  | Unique Identifier | Birth Date | Age At Entry | Current Age | Enroll Date | Exit Date  | LOS | Housing Move-in   | A | S           | CN | Assigned Staff              |   |
| <b>Program: Arches Navigation Center</b>  |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Fever, Cedar  | F32DE8A0A         | 11/30/1999 | 20           | 21          | 01/21/2020  | -          | 0   |   | 0 | 0           | 0  | S. Hoffman                  |   |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Clients:          | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Households:       | : |
| <b>Program: Coordinated Entry Access Point</b>  |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Canyon, Bryce   | AAFEF1344         | 09/12/1979 | 40           | 41          | 01/02/2020  | -          | 334 |   | 0 | 0           | 0  | S. Hoffman                  |   |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Clients:          | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Households:       | : |
| <b>Program: Street Outreach Program</b>   |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Bend, Big   | FBD52A648         | 10/07/1976 | 42           | 44          | 12/29/2018  | -          | 703 |   | 0 | 0           | 0  | S. Hoffman                  |   |
| Jonez, Maroon   | F3670B32B         | 01/12/1965 | 55           | 55          | 02/06/2020  | -          | 299 |   | 0 | 0           | 0  | S. Jones*                   |   |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Clients:          | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Households:       | : |
| <b>Program: Zion Housing</b>  |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Mouse, Malia  | 33347CB86         | 01/02/2018 | 1            | 2           | 02/01/2019  | -          | 669 | undefined   | 0 | 0           | 0  | S. Jones*                   |   |
| Mouse, Minnie   | 471CA3370         | 01/25/1985 | 33           | 35          | 11/11/2018  | -          | 751 | 11/11/2018  | 0 | 1           | 0  | S. Jones*                   |   |
| Tree, Pine  | 61F0D4B00         | 06/04/2011 | 9            | 9           | 06/25/2020  | -          | 159 | undefined   | 0 | 0           | 0  | S. Hoffman                  |   |
| Canyon, Bryce   | AAFEF1344         | 09/12/1979 | 41           | 41          | 10/08/2020  | 10/08/2020 | 0   | 10/08/2020  | 1 | 1           | 0  | G. Demo                     |   |
| Tree - do Not Use, Evergreen  | 76764A8E7         | 07/01/1988 | 32           | 32          | 10/26/2020  | -          | 36  | 10/26/2020  | 0 | 0           | 0  | S. Hoffman                  |   |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Clients:          | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Number of Households:       | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Total Number of Clients:    | : |
|   |                   |            |              |             |             |            |     |   |   |             |    | Total Number of Households: | : |
| denotes Inactive Assigned Staff   |                   |            |              |             |             |            |     |   |   |             |    |                             |   |
| Program Name  |                   |            |              |             |             |            |     | Project Type  |   |             |    |                             |   |
| Arches Navigation Center  |                   |            |              |             |             |            |     | Emergency Shelter                                       |   |             |    |                             |   |
| Coordinated Entry Access Point  |                   |            |              |             |             |            |     | Coordinated Entry                                       |   |             |    |                             |   |
| Street Outreach Program   |                   |            |              |             |             |            |     | Street Outreach   |   |             |    |                             |   |
| Zion Housing  |                   |            |              |             |             |            |     | PH - Permanent Supportive Housing (disability required) |   |             |    |                             |   |

If a household does not appear on the program roster report, they must be enrolled in the program. If you see 'undefined' in the move-in date column next to a HoH member on the roster and you know the client has moved into their unit, the enrollment must be linked to the enrollment.

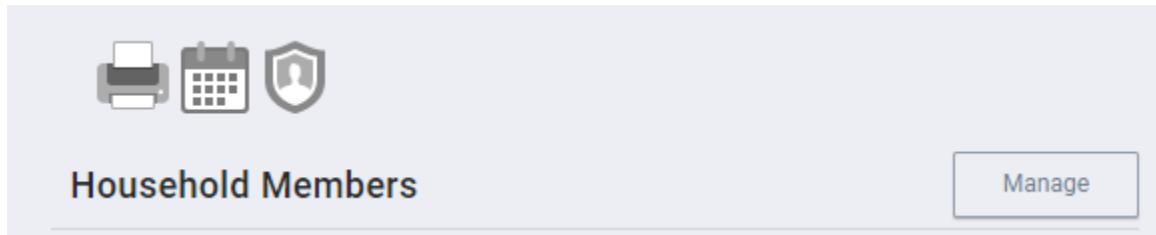
There are also other reports in the system that you have access to provide a bigger picture of the work being done in San Francisco's Homeless Response System. Feel free to download any report you have access to that interests you and helps you understand your work better.



## Managing Households

Both housing locators and service providers are responsible for ensuring households are appropriately managed in ONE. Households need to be correctly connected and associated in ONE to ensure data is accurate and households are joined in program enrollments. Household composition is defined by the client. Anyone who will be residing in the same unit should be associated in the same household. Below are the step-by-step instructions on managing households in ONE:

1. Households need to first be connected at the profile level. If a household member has never been entered in the ONE System, they would need a new profile created. First verify that they are not in the system before completing a new profile.
  - a. New members can be added at the right of the client's profile screen, under **Household Members**. Select **Manage** to begin.



- b. Enter the name of the additional household member into the search bar. Verify you have found the correct person using the date of birth or last four of their SSN, and hover over their name to display the Add button. Select Add.

HOUSEHOLD MANAGEMENT

Search for a Household Member

Jane Doe SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

| Client   | Date of Birth | Last Four SSN | Last Updated |
|--|---------------|---------------|--------------|
| Jane Doe<br>Existing Group. Head of Household: Brian Smith. Members: 2 | 04/25/1983    | 0000          | 12/14/2021   |
| Jane Doe   | 01/01/1947    | 6789          | 04/28/2023   |
| <span>+</span> Add Jane Doe10  | 12/01/1986    | 3456          | 08/29/2023   |

- c. A window will pop up that allows you to select the relationship and the date that the additional household member joined the household. This date should be on or before the date that the household moves into the unit.

- d. Once complete, the household members will show on the right side of either client's profile. The individual with the star is designated as the Head of Household. You can then edit the head of household's relationship.

| Household Members |         |
|-------------------|---------|
| Lo California     | Niece ★ |
| Jane Doe10        | Aunt    |

2. Clients also need to be connected as a household when enrolling into a program.
- When completing an enrollment, find the section that says include Group Members. Toggle this on for any members of the household that will also be living at this site.

Include group members:

☒ Jane Doe10

- When enrolling, an enrollment screen will appear for each household member. The relationship to the Head of Household must be designated for each household member. The Head of Household should be the individual with the primary eligibility for the program. If the eligible person was not already set as the Head of Household at the client profile level, edit to reflect appropriate head of household.

Enroll 'Abode Services - Flexible Housing Subsidy Pool Over 60 - Prop C' program for client Jane Doe10



3. If a household member moves in after the head of household, they should be added to the enrollment, rather than enrolled separately.

- a. Open the head of household's program enrollment, and look for Program Group Members on the right side of the screen. Select **(+)** to add in other household members.
- b. A pop-up window will appear with all household members listed. Toggle on those you wish to add to the enrollments. Anyone who will be residing in the unit should be included in the enrollment.

ENROLL ADDITIONAL MEMBERS
✕

☐

Jane Doe10                      Aunt

ENROLL

99

Loretta Vallot,  
 [TRAINING] Department of Homeles...

LV

🔍 SEARCH
☰ CASELOAD

## 2

DAYS  
ACTIVE PROGRAM

|                     |   |
|---------------------|---|
| Program Type:       | Individual  |
| Program Start Date: | 09/27/2023  |
| Assigned Staff:     | Loretta Vallot                                    |
| Head of Household:  | Lo California <input checked="" type="checkbox"/> |

### Program Group Members

+ Add

No active members

- c. Select **Enroll**, which will prompt you to complete the enrollment screen for the additional household member(s). Once completed, household members will show under **Program Group Members** for the original enrollee.

## 2

DAYS  
ACTIVE PROGRAM

|                     |  |
|---------------------|--|
| Program Type:       | Group (2)  |
| Program Start Date: | 09/27/2023   |
| Assigned Staff:     | Loretta Vallot <input checked="" type="checkbox"/> |
| Head of Household:  | Lo California <input checked="" type="checkbox"/>  |

### Program Group Members

|            |            |        |
|------------|------------|--------|
| Jane Doe10 | 09/29/2023 | Active |
|------------|------------|--------|



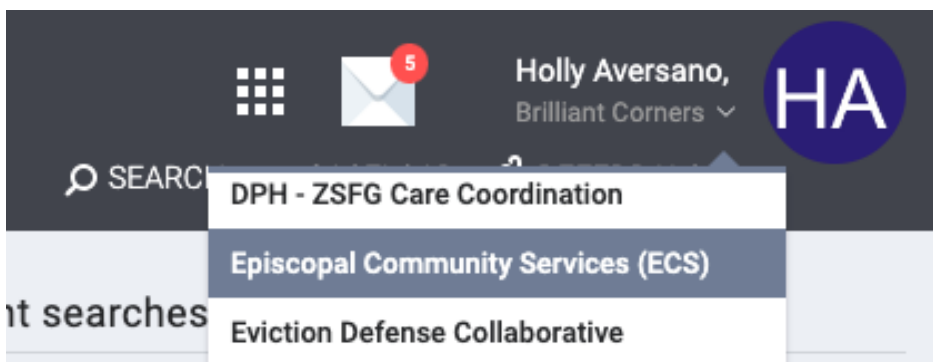
## Switching Between Agencies

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Programs in ONE are organized under Agencies, which primarily correspond with provider organizations.

You may need to switch agencies in order to enroll a client into a program and/or edit a client's enrollment in ONE (including entering move in information). You can switch your active agency by simply clicking on the agency toggle underneath your name in the top righthand corner and selecting a different agency.

When you are in ONE, the Agency that is listed under your name in the top right corner is the Agency that you are currently viewing and working under. You will see different programs and services depending on the Agency you are in.



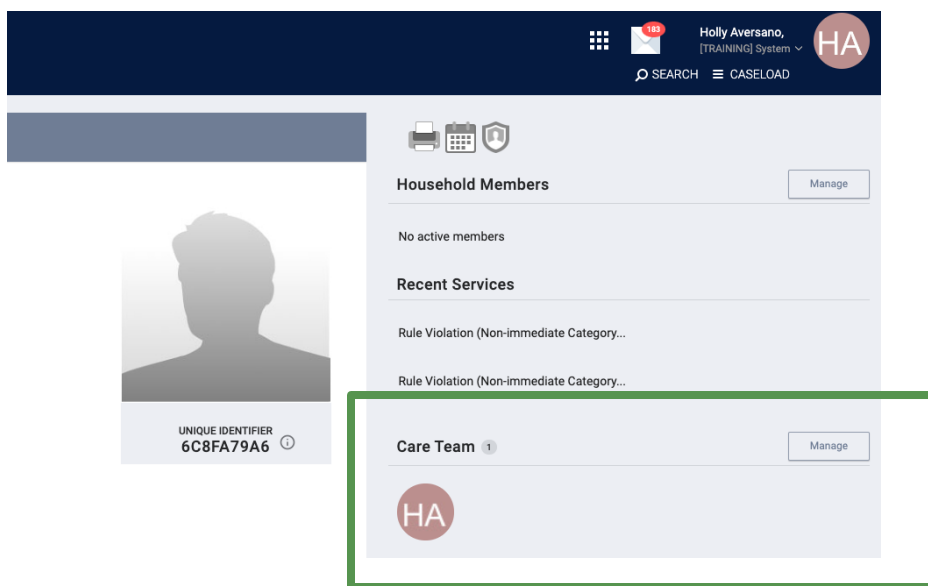


## Care Team Members

What is a care team member?

- An assigned staff involved with the client's care:
  - Through a Program Enrollment
  - Being Assigned Case Manager
  - Assigned as a Navigator

From the client Profile page, you can access the Care Team on the right-hand side of the screen. From there, you can manage Care Team by selecting the "Manage" button next to the Care Team section.



From the Care Team Management Screen, you will be able to view active and inactive Care Team Members, as well as add new Care Team Members to the client's profile.

- To add a new Care Team Member, select the "Add Care Team Member" button.

 A screenshot of the "CARE TEAM MANAGEMENT" screen. At the top right, there is a button labeled "ADD CARE TEAM MEMBER" with a plus icon, which is highlighted with a green rectangular box. Below this, the screen is divided into two sections: "Active Care Team" and "Inactive Care Team". Each section contains a table with columns for "Care Team Member", "Type", "Start Date", and "End Date".
 

| Care Team Member   | Type       | Start Date | End Date |
|--|------------|------------|----------|
| Holly Aversano<br>[TRAINING] San Francisco Housing Authority | Enrollment | 03/30/2022 |          |

| Care Team Member                        | Type       | Start Date | End Date |
|---|------------|------------|----------|
| Holly Aversano<br>[TRAINING] HSH: SFHOT | Enrollment | 2022       | 2023     |

Next, a pop-up screen will allow you to begin to assign a new Care Team Member.

- Select the drop down arrow to select from the list of staff.
- Enter the date the Care Team Member was assigned to the client.
- Select “ADD”
- To remove a Care Team Member, simply enter the date the Care Team Member stopped working with the client as the End Date and select “Update”.

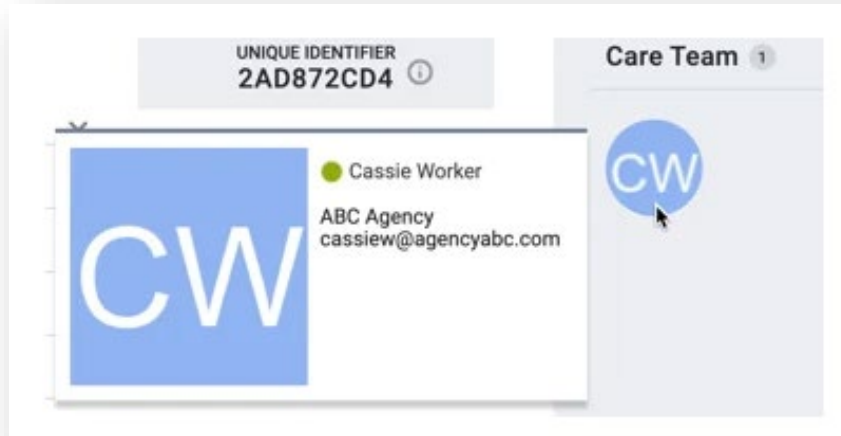
Keep the Public toggle ON as in the example above. You should avoid marking the Care Team Member as private (unless you are required to do so) as it prohibits information from being shared across the system.

You are also able to change the Assigned Staff from the program enrollment by selecting the Edit icon and selecting staff from the drop- down list. You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.



## Care Team Helpful Hints

By hovering over the Care Team Member icon, you are able to view the Care Team Member contact information.



On the Care Team Management screen, you are able to view whether the assigned staff were added to the Care Team manually or through an enrollment.

| CARE TEAM MANAGEMENT        |            |            |          |  | ADD CARE TEAM MEMBER + |  |
|-----------------------------|------------|------------|----------|--|------------------------|--|
| Active Care Team            |            |            |          |  |                        |  |
| Care Team Member            | Type       | Start Date | End Date |  |                        |  |
| Cassie Worker<br>ABC Agency | Enrollment | 04/21/2022 |          |  |                        |  |

## Release of Information (ROI) Management in ONE

ONE will prompt for a Release of Information to be completed when a client profile is created and must be updated every 3 years. Profiles with missing or expired Releases of Information will be flagged with a yellow banner.

**⚠ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.**

To maintain compliance, each client profile must have an up-to-date and active ROI recorded both as:

- A file uploaded into client profile in **FILES**
- AND**
- An electric signature recorded in **Client Privacy** section of client profile:

| Start Date | End Date   | Version |  |
|------------|------------|---------|--|
| 02/06/2019 | 02/06/2021 | V.37    |  |
| 03/01/2023 | 03/01/2026 | V.37    |  |

- Valid date will automatically start on today's date and end 3 years from today.
- Options for Electronic Signature or Verbal Consent
  - Note that Verbal Consent should *only* be selected if you are not able to have the client sign documentation in person
- NOTE: The start date for a new ROI cannot overlap with the end date of an old or current ROI

**RELEASE OF INFORMATION**

Permission: Yes

Start Date: 10/04/2023

End Date: 10/04/2026

Documentation: Electronic Signature

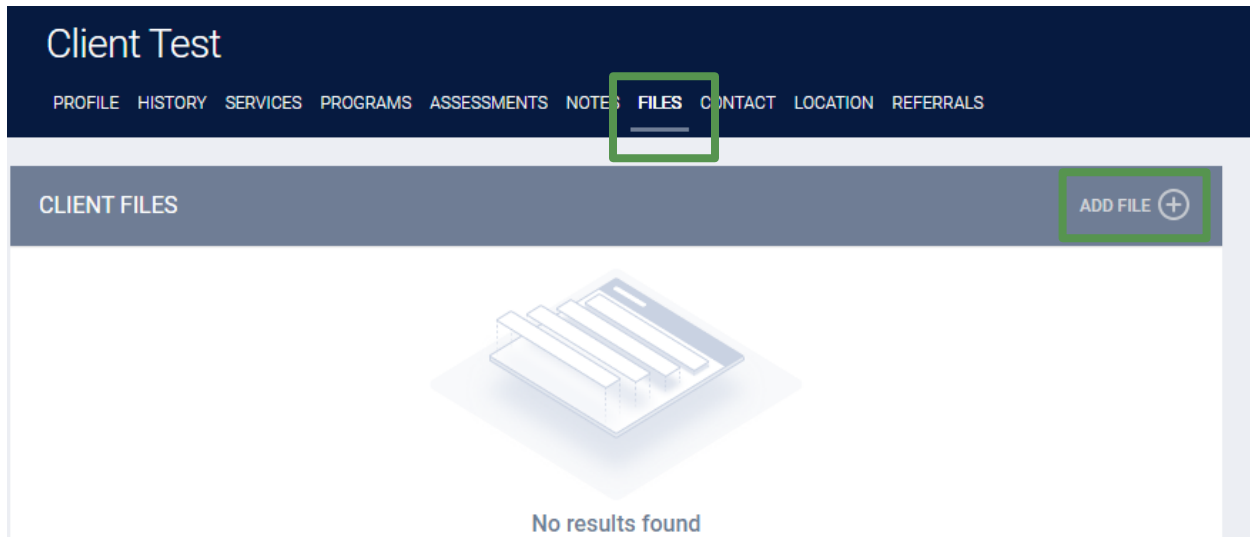
**E-SIGN DOCUMENT**

**SAVE CHANGES** **CANCEL**



**To upload an ROI as a File in ONE**

1. Select the FILES tab



2. Select the categories for Release of Information
  - Homelessness Response System
  - Human Services Agency
3. Select your file from your computer using the “Select File” button
4. Click SAVE CHANGES

A screenshot of the 'UPLOAD A FILE' form in the ONE System. The form is titled 'UPLOAD A FILE' in a grey bar at the top. Below this, the 'FILES' tab is selected in the navigation bar. The form contains the following fields:

- Category:** A dropdown menu with 'Release of Information' selected.
- Predefined Name:** A dropdown menu with 'Release of Information: Homeless R' selected.
- File:** A button labeled 'Select File'.
- Private:** A toggle switch that is currently turned off.

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

## Resources

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As a provider, you have access to the Bitfocus Help Desk to answer any questions, as well as correct any errors made in the system. Here are the three ways to get support through the Bitfocus Help Desk:

1. Bitfocus Help Desk  
[onesf@bitfocus.com](mailto:onesf@bitfocus.com)  
415.429.4211
2. ONESF Help Center Website  
<https://onesf.bitfocus.com/>
3. Help Desk Widget (In bottom right corner of ONE System and on ONESF Help Center Website)

