Scattered Site Training Series #2

Using the ONE System

Bitfocus

Welcome!

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AGENDA

- Switching Agencies
- Managing Households
- Care Team Members
- Release of Information (ROI) Management
- Processing Referrals
- Program Enrollments
- Services
- Housing Move-in Dates
- Annual Assessments
- Program Exits
- Helpful Reports

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A quick note about the Engagement Policy

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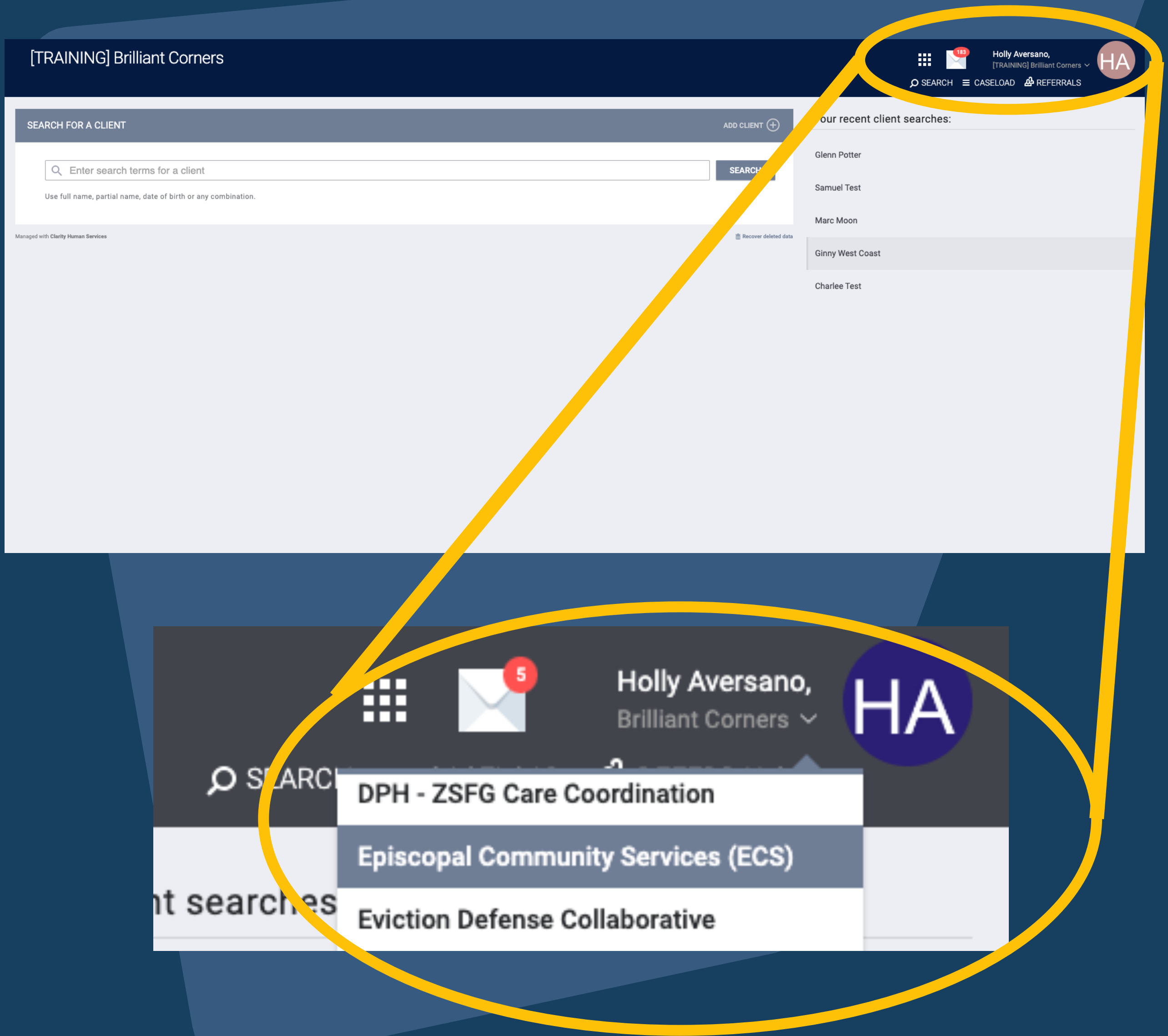
Switching Agencies

- May need to switch agencies in order to enroll a client into a program and/or edit a client's enrollment in ONE
- You can switch your active agency by simply clicking on the agency toggle in the top righthand corner under your name



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Managing Households

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Tips For Recording Accurate Household Information

1

Each family member must have a client profile before they can be added to a household.

2

Add or remove household members as the household composition changes.

3

Be sure to identify the Head of Household (HoH)

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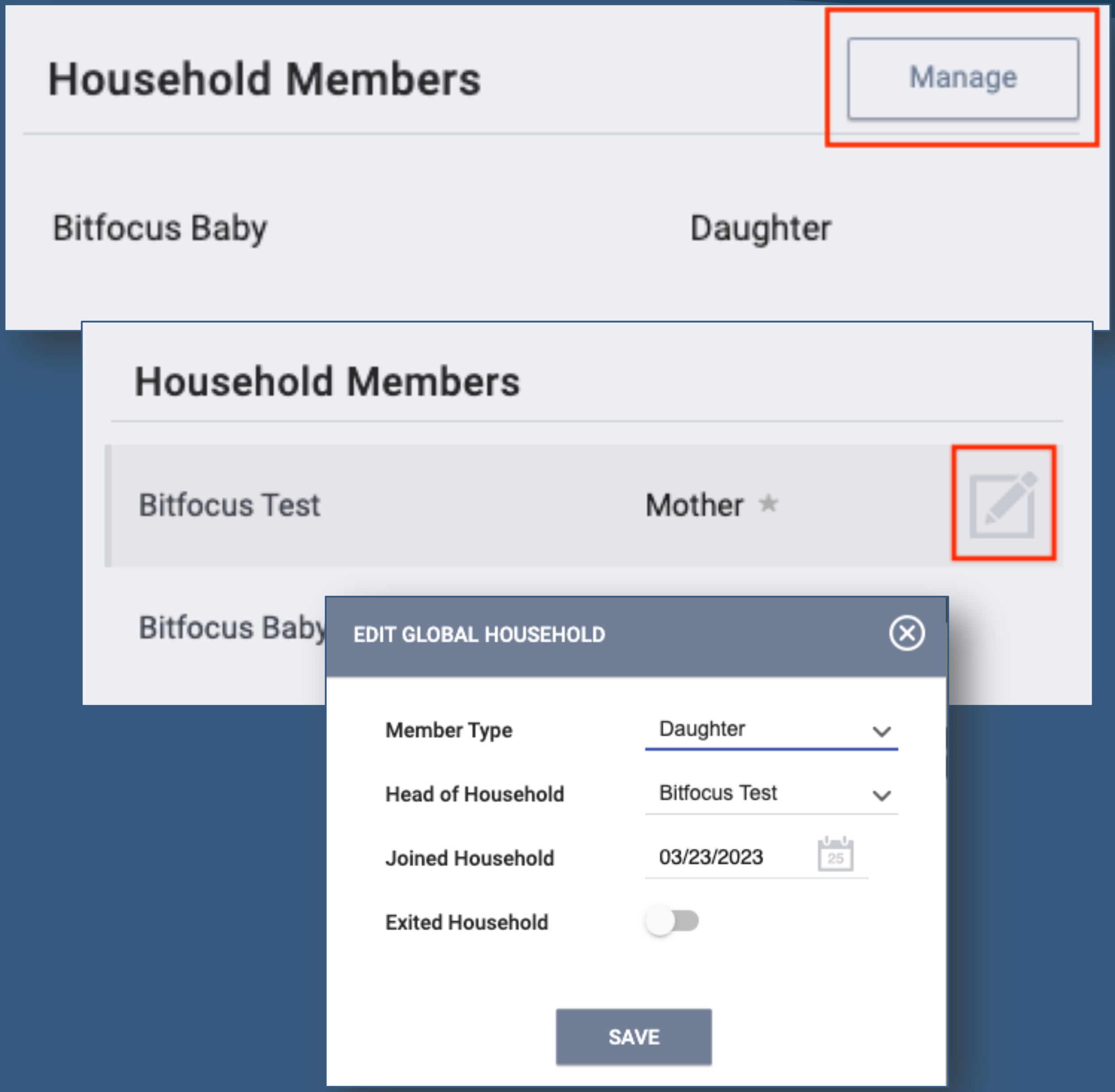
Managing Households

Select the “Manage” button to manage Household Members.

Select the edit icon under Household Members

Identify the Head of Household

Update information or toggle on exit



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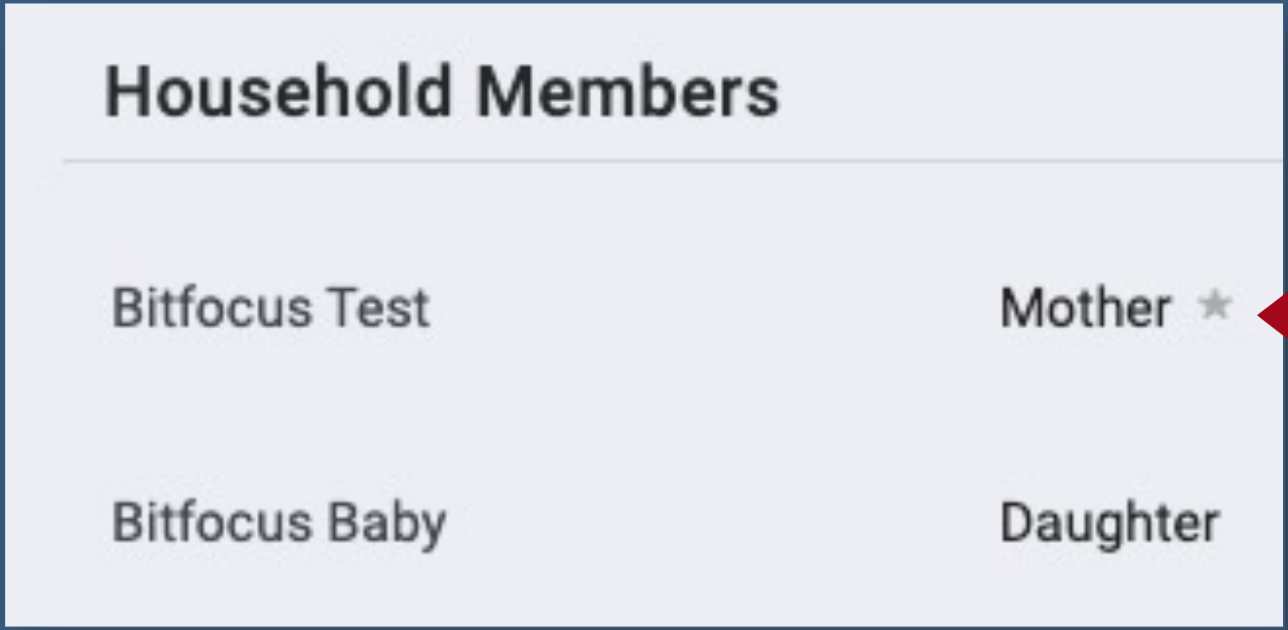
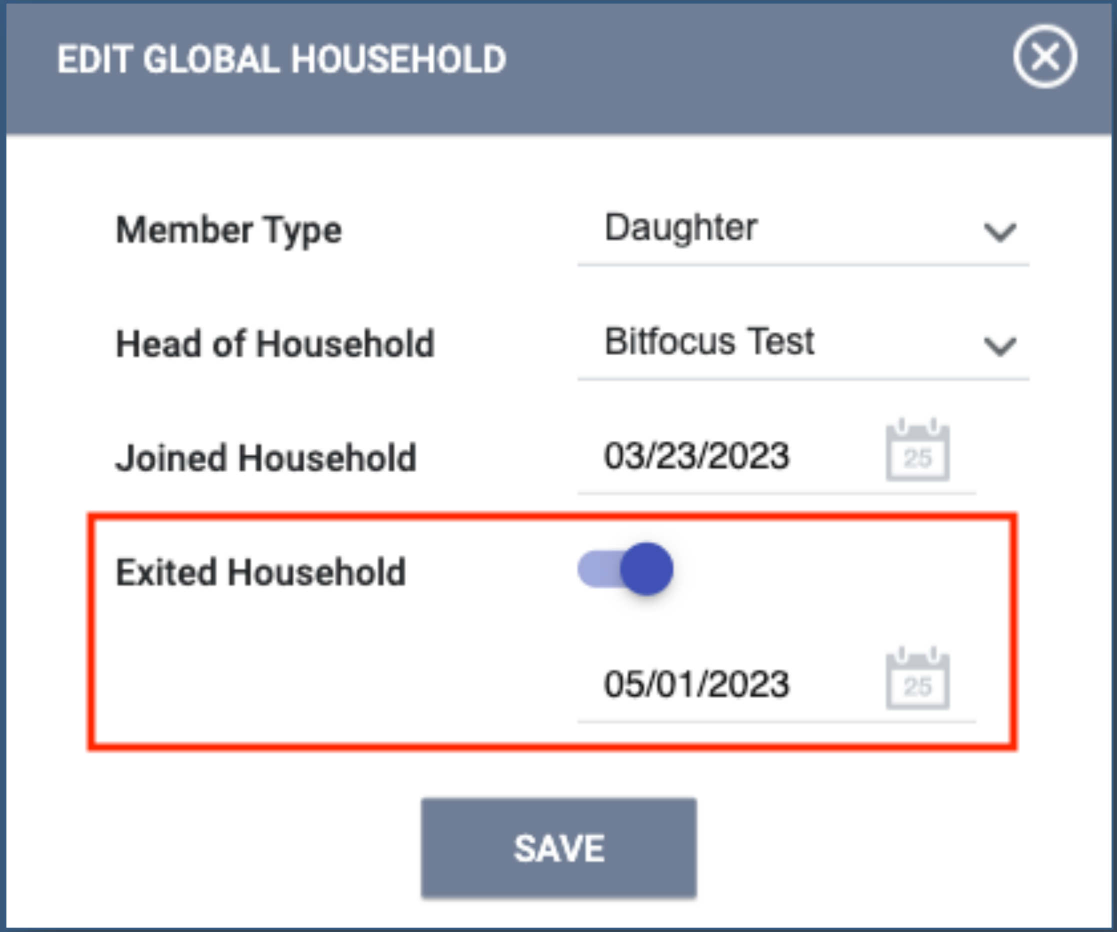
Managing Households



The "Star" indicates who has been identified as the Head of Household (HoH)

Managing households

- Toggle on ”Exited Household to remove a member from the Household.
- Enter the Date the household member left the household.
- Select “Save.”



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Remember When Managing Households!

- By default, a newly created client record will not be associated with a household.
- Active household members will be listed in the “Household Members” section in the right-hand sidebar of a client’s profile.
- Use the Manage button on the client’s profile page to add/join members to a household.
- Clients can leave or join a new household, but can not be a member of two households at the same time at the client level.
- Household members can be exited from a household by toggling a single button and recording the date they exited the household.
- The exited date can not be earlier than the joined date.
- If the exited household member is the head of household, there will be a prompt to select a new head of household.
- A member who is exited from a household can rejoin the household at any time.

QUICK POLL!

What does the **star** next to a household member mean?

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QUICK POLL!

Is it possible to **add** a household member who was previously deleted back into the household?

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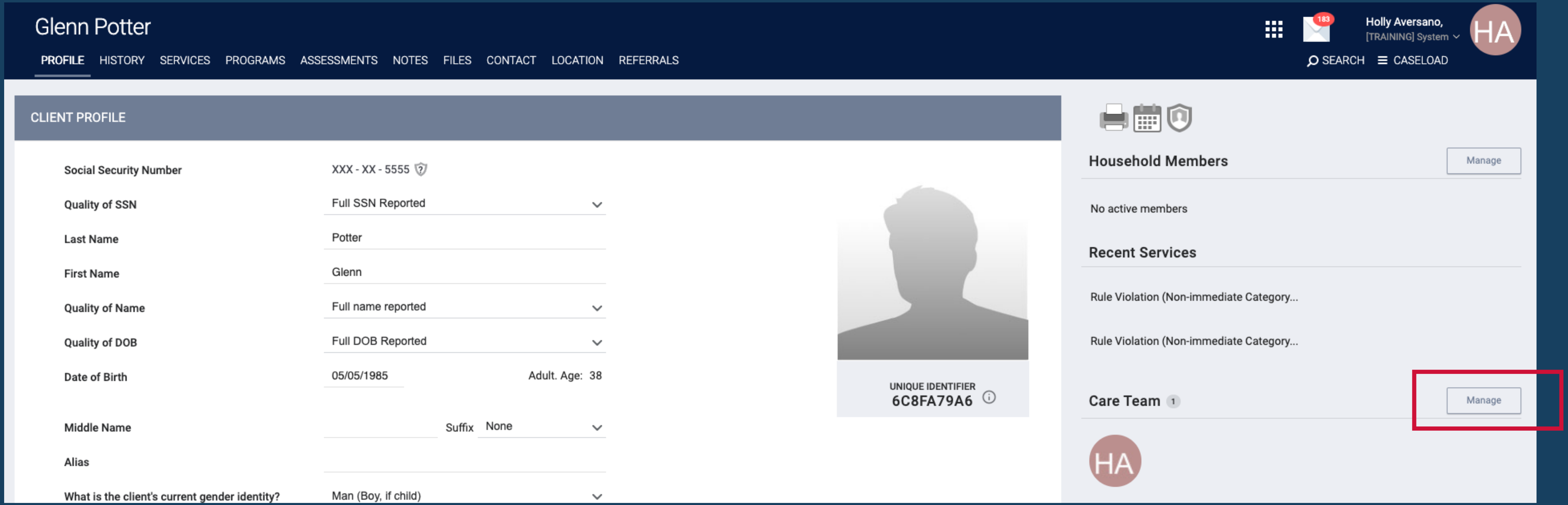
Care Team Members

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



1. From the client Profile Page, you can access the Care Team on the right-hand side of the screen.
2. From there, you can manage Care Team Members by selecting the “Manage” button next to the Care Team section.

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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.

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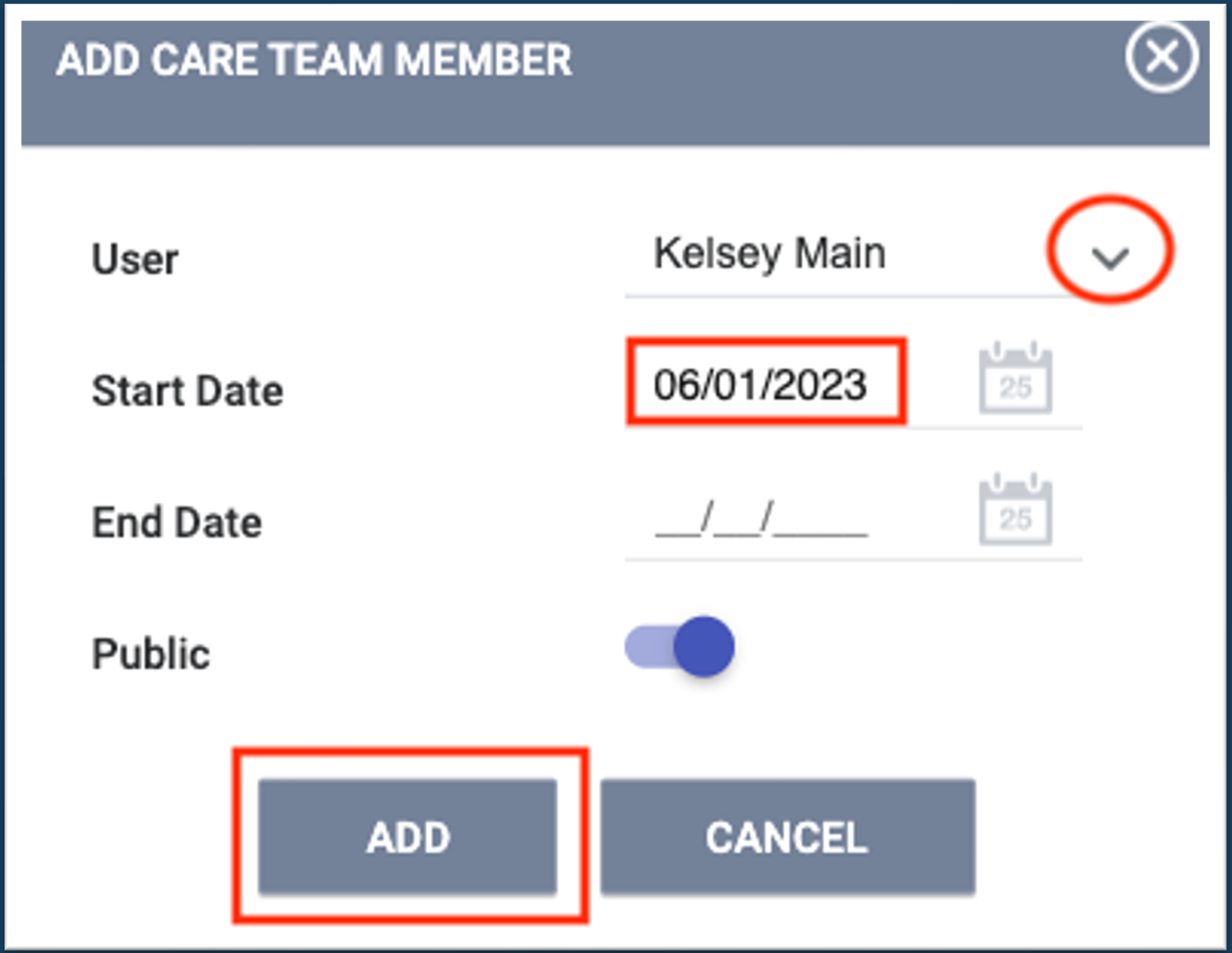

Next, a Pop-Up Screen will allow you to begin to assign a new Care Team Member

- Select the drop down arrow to select from a list of staff.
- Enter the date the Care Team Member was assigned to the client.
- Select "ADD"

*Avoid using marking the Care Team Member as private (unless you are required to do so) as it prohibits information from being shared across the system

- 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."

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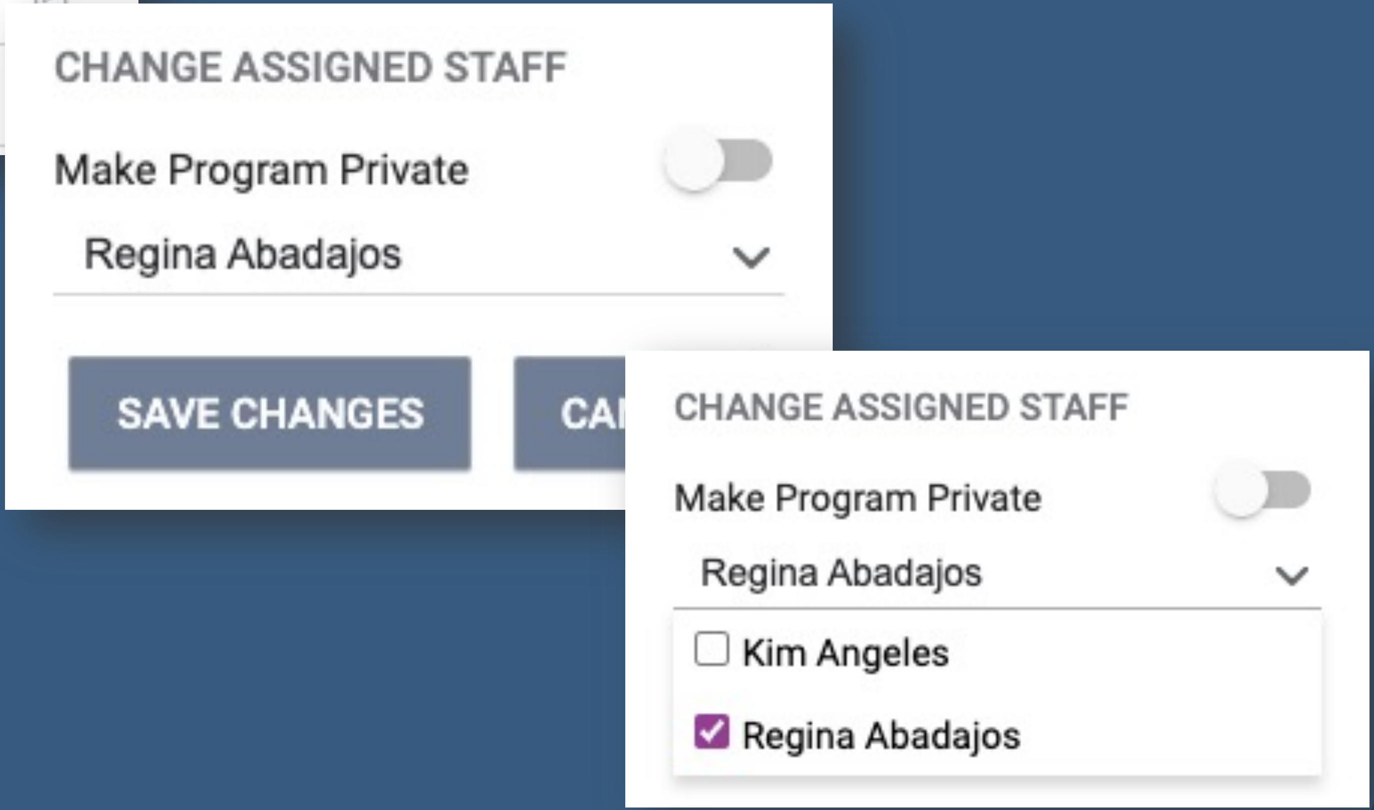
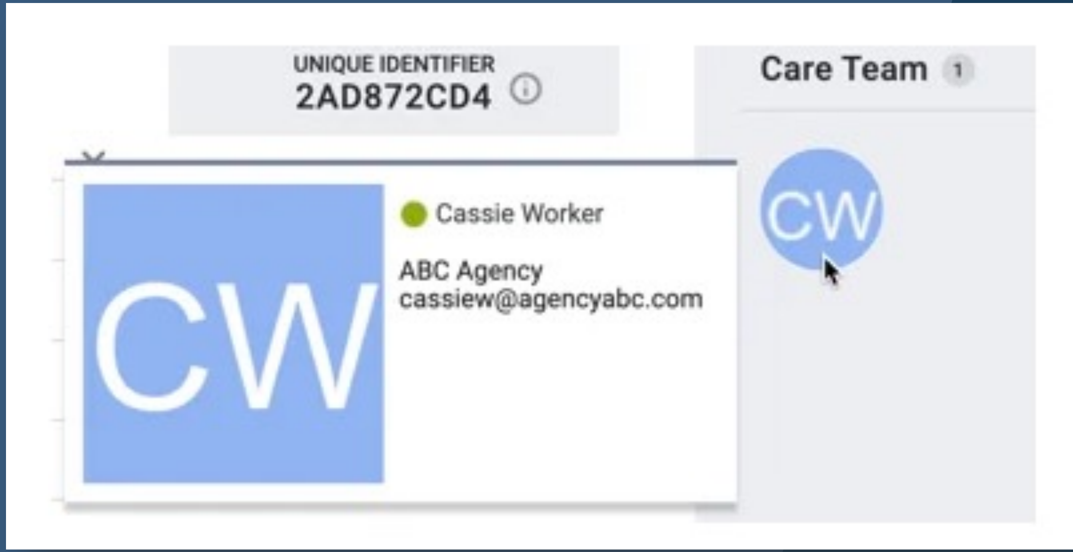


You are also able to change the Assigned Staff from the Program Enrollment by selecting the Edit Icon and selecting staff from the drop-down list.

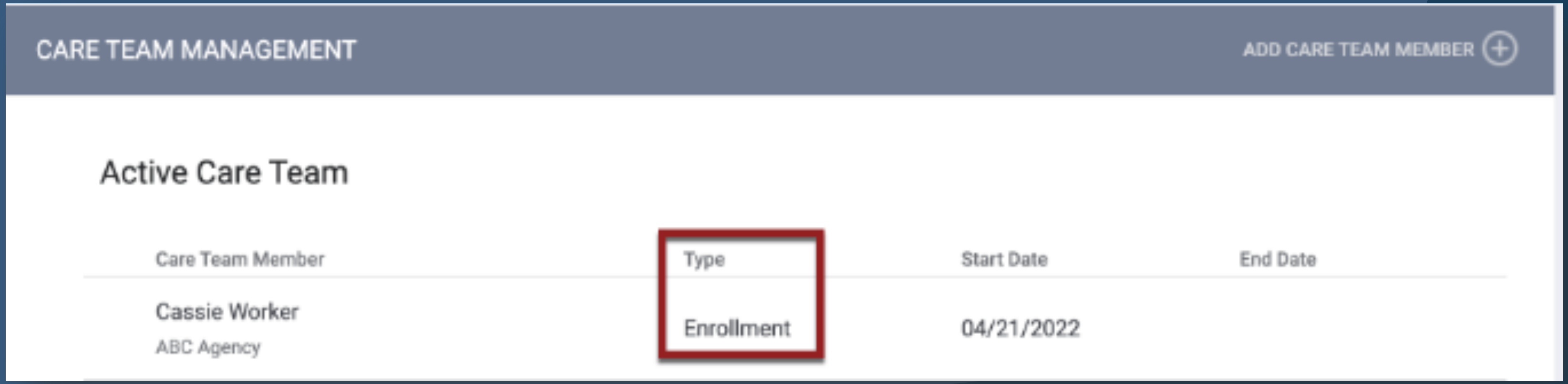
You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.

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 the whether the assigned staff were added to the Care Team manually or through an Enrollment.



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QUICK POLL!

True or false? Care team members should always be HSH employees.

QUICK POLL!

True or false? Care team members should be listed in the ONE System as **private**.

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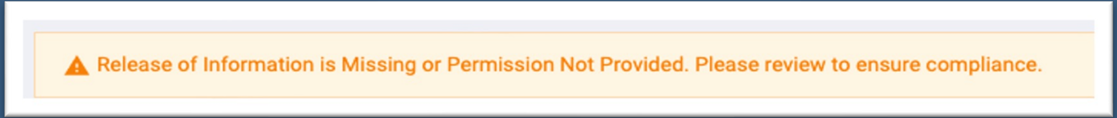
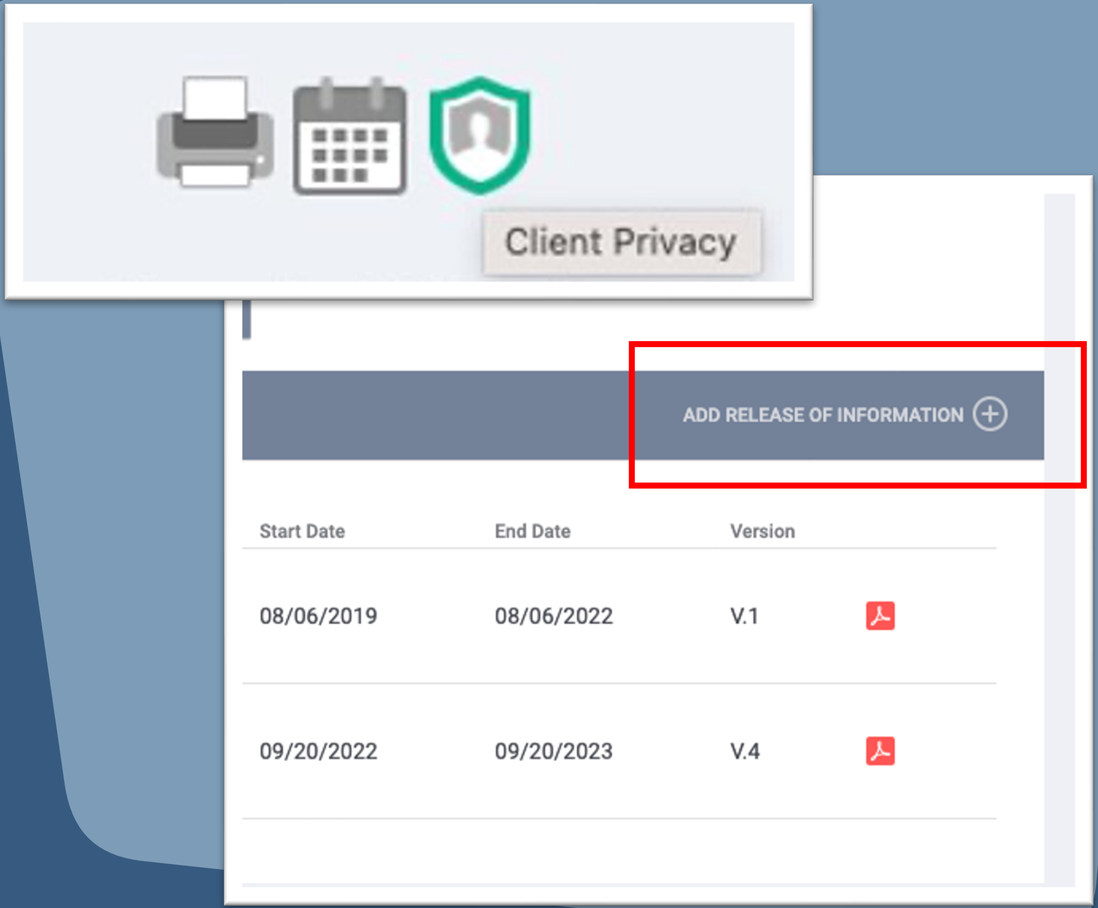
Release of Information (ROI) Management in ONE

Release of Information

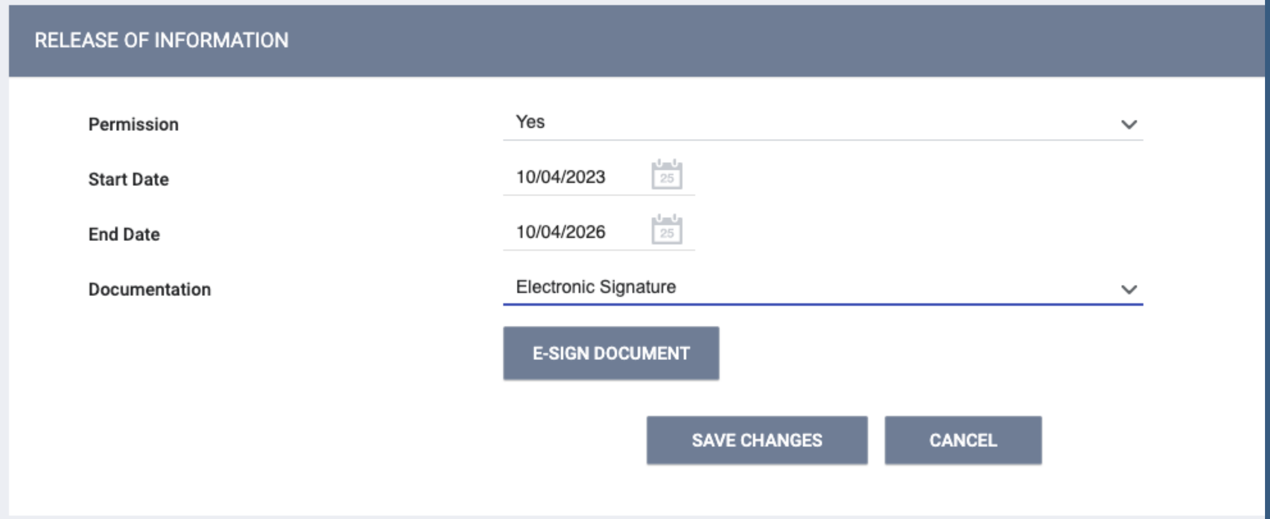
- ONE will prompt for a Release of Information to be completed when a client profile is created and must be updated every 3 years
- Profiles with missing or expired Releases of Information will be flagged with a yellow banner



- To maintain compliance, each client profile must have an up-to-date & active ROI recorded both as:
    - A file uploaded into client profile
    - An electronic signature recorded in Client Privacy section of client profile (shield icon)

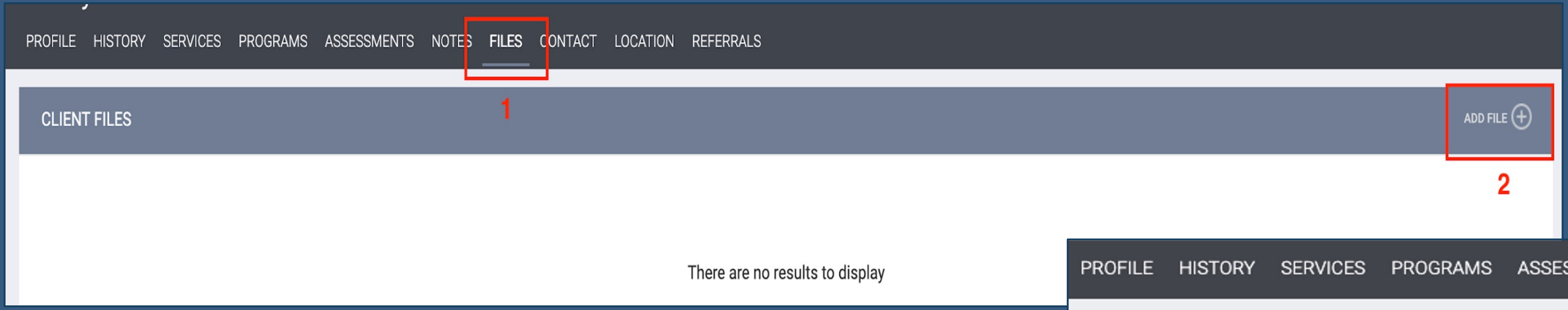


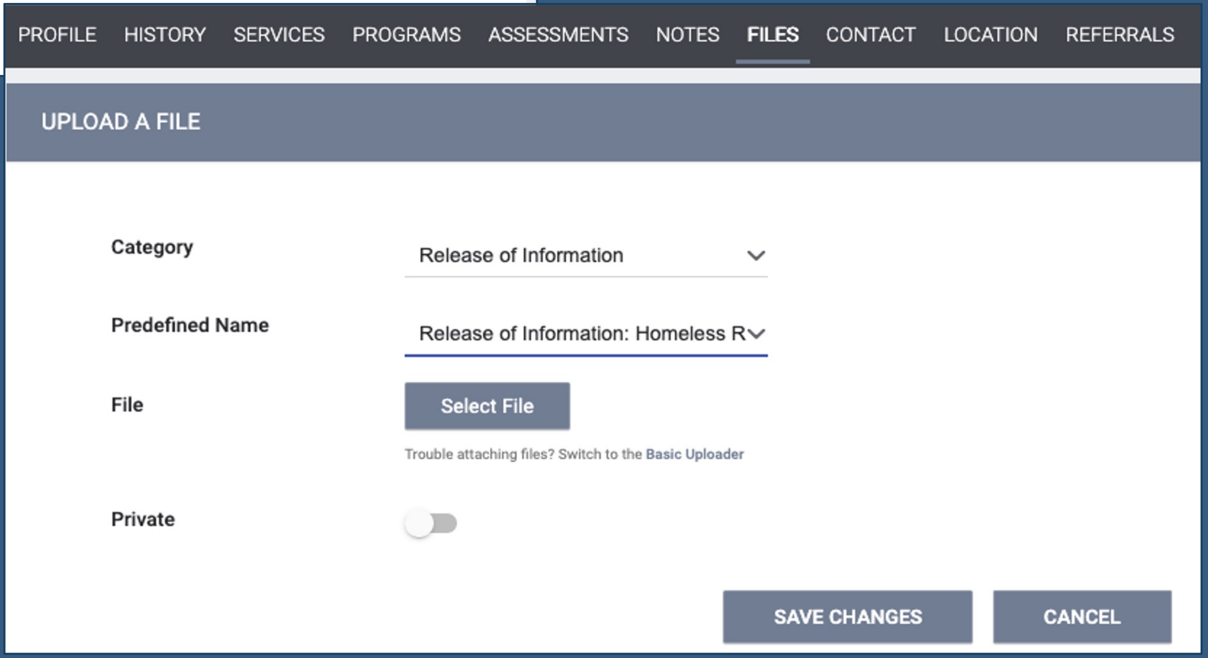
Release of Information: Tips



- Date will automatically populate to 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: Start Date for a new ROI cannot overlap with the end date of an old or current ROI

Uploading an ROI as a File in ONE





To upload an ROI:

1. Select the Files tab
2. Select the categories for Release of Information
   - Homeless Response System
   - Human Services Agency
3. Select your file from your computer using the Select File button
4. Click Save Changes

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QUICK POLL!

How many types of **ROIs** are required in the ONE System?

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Breakout Room #1 (10 minutes)

- You will enter a 3-4 person breakout room
- Step 1: Pick a group leader to run a demonstration!
- Step 2: Group leader shares their screen, opens the ONE System, and navigates to the profile of an actual client
- Step 3: As a group, talk through the steps to:
    - Add a household member
    - Update household information
    - Add a care team
    - Complete ROI toggle and file upload

**IMPORTANT: Do not actually make changes to client's profile

- Step 4: Group discussion. As an agency, how do you ensure ROIs and Care Teams stay up to date?

Processing Referrals

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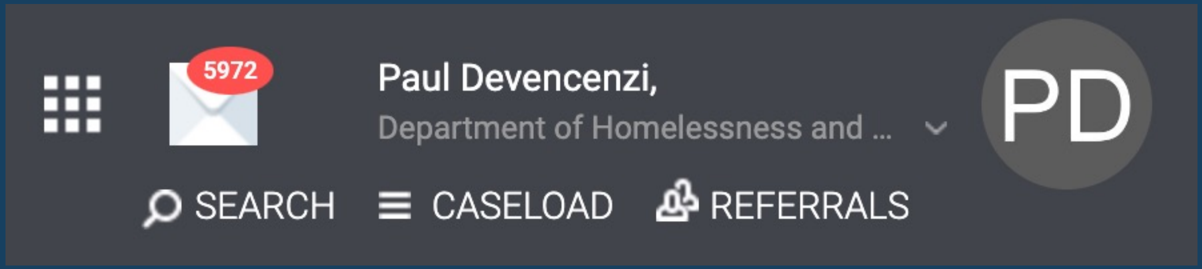
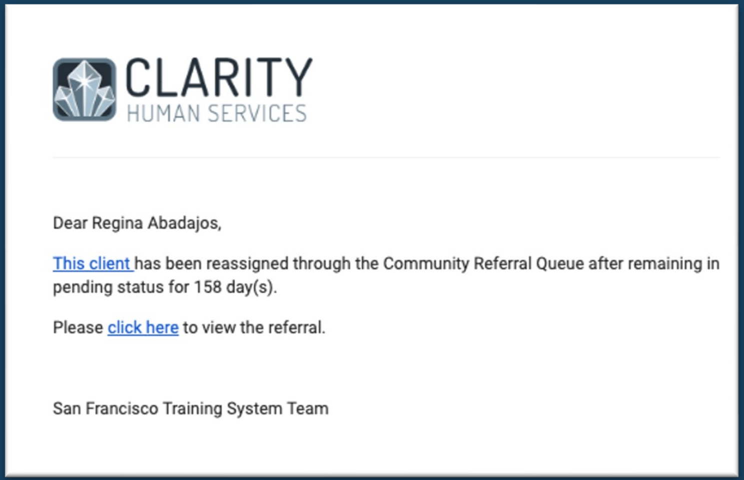
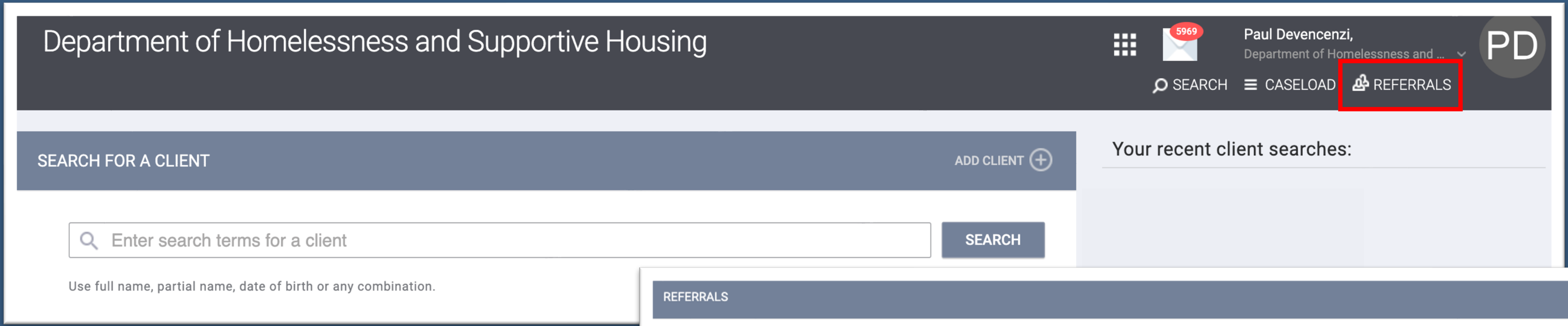
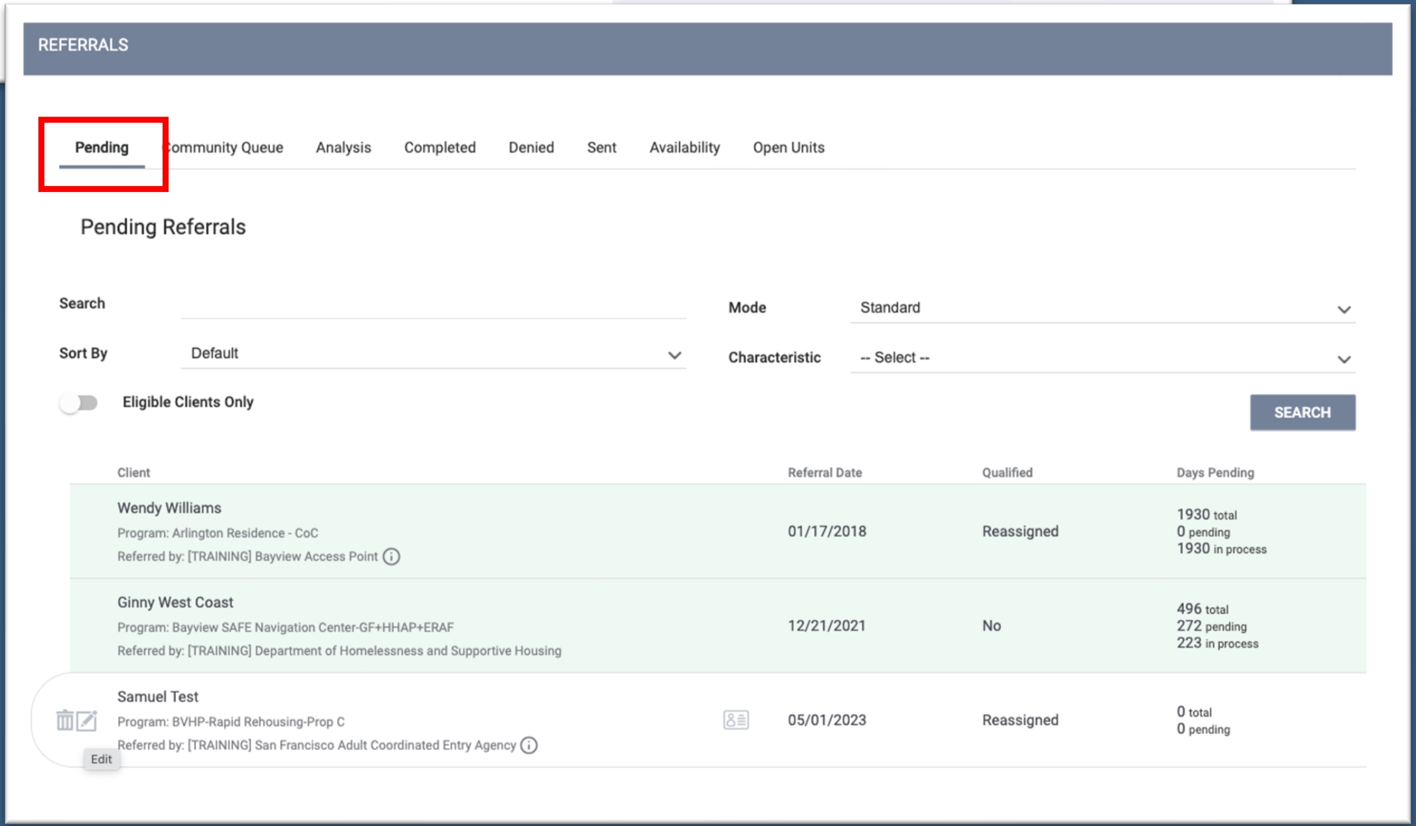
Processing Referrals: Referral Notifications





You will receive a 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

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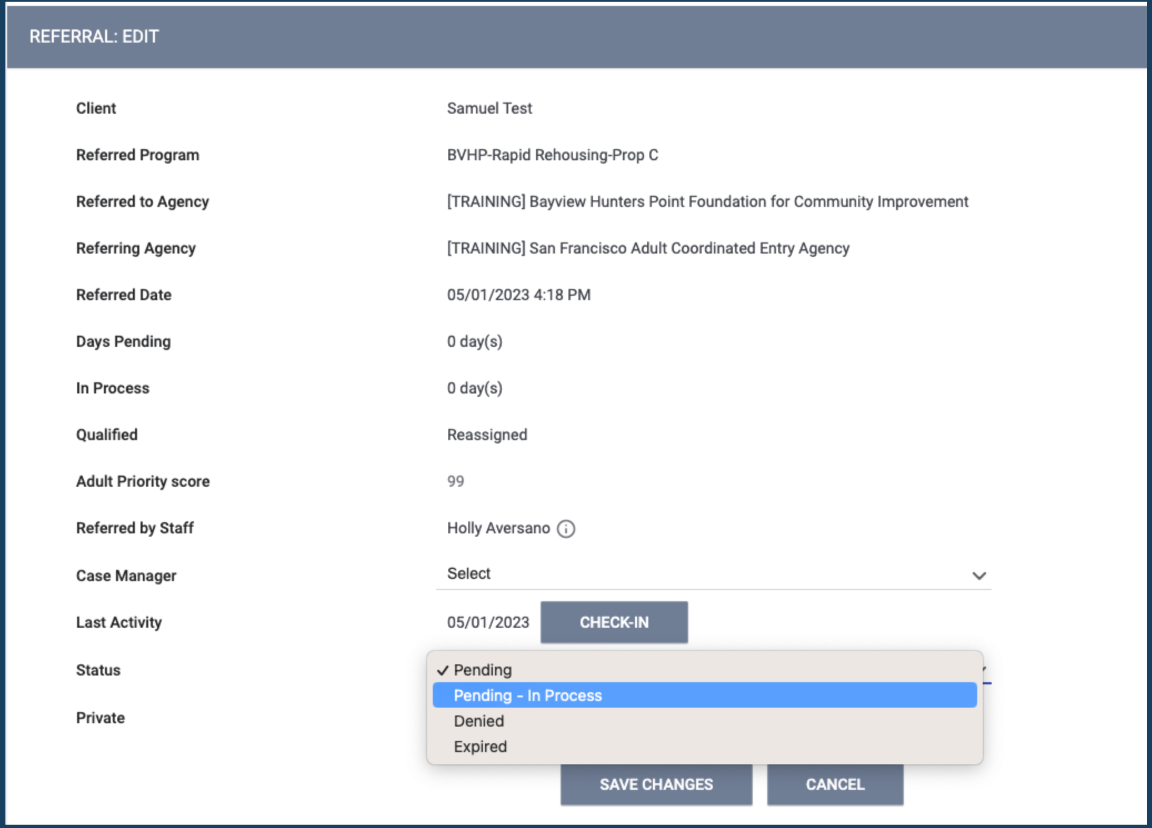
Processing Referrals: Pending – In Process

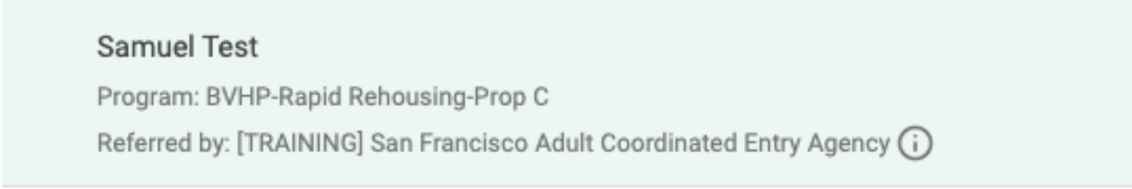
- 'Pending – in Process' = when you want to accept a referral but aren't ready to make an enrollment (i.e. you're still outreaching the client)
- To accept the referral, change referral status from 'Pending' to 'Pending – in Process'



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 CHECK-IN
Status	✓ Pending / Pending - In Process / Denied / Expired
Private	

SAVE CHANGES CANCEL



Samuel Test

Program: BVHP-Rapid Rehousing-Prop C

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

- Referral color will change to green when status is changed to 'Pending - in Process'
- Note that status should be changed from Pending to Pending in Process within 72 hours of receiving the referral

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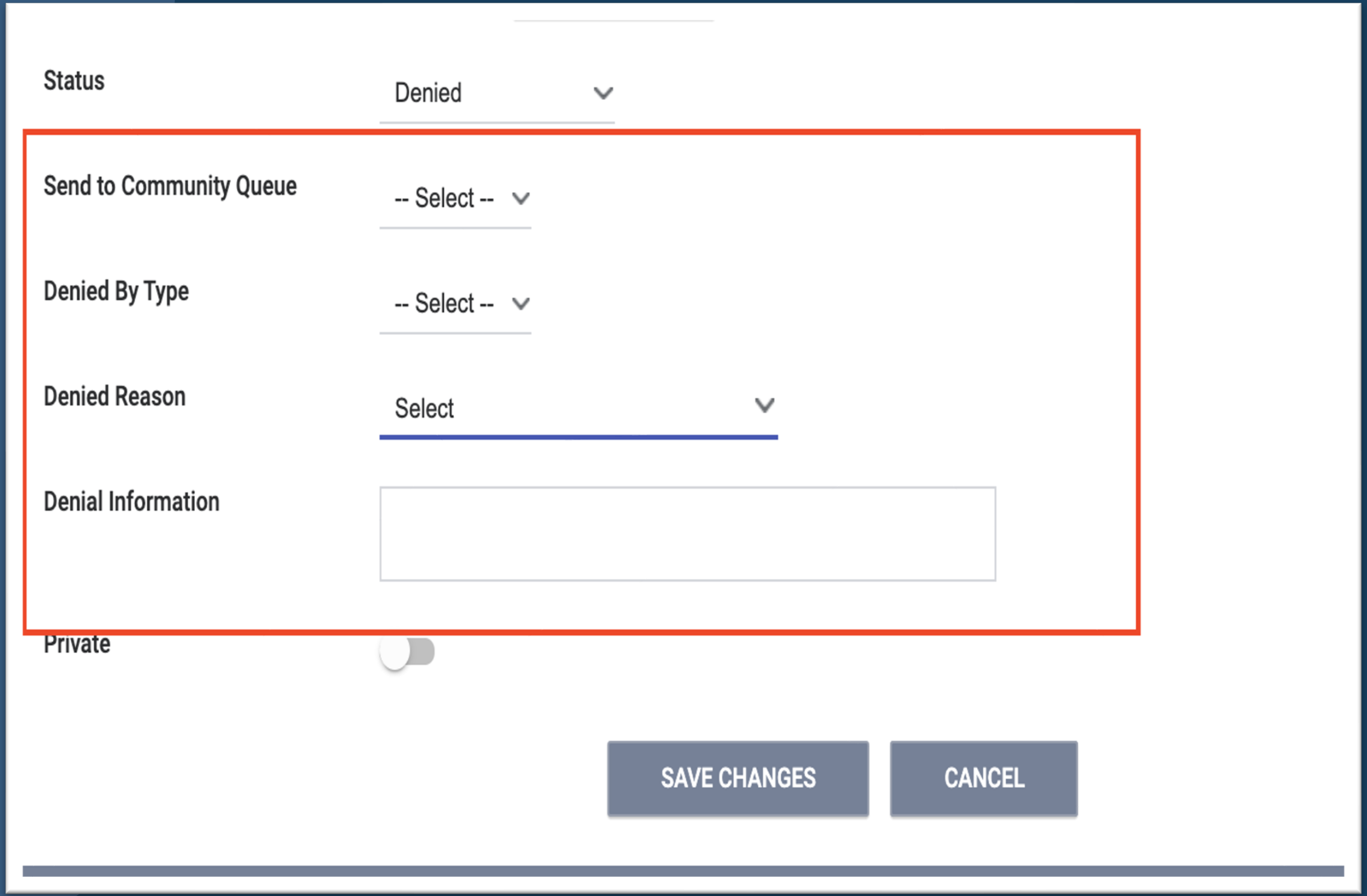
Processing Referrals: Denying a Referral

- 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.

- **Send to Community Queue:** Yes/No
- **Denied By Type:** Provider/Client
- **Denied Reason:** Reason for the denial
- **Denial Information:** Provide additional details explaining the reason for the denial



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QUICK POLL!

How quickly should you switch a **new referral** from pending to pending-in-process?

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Program Enrollments

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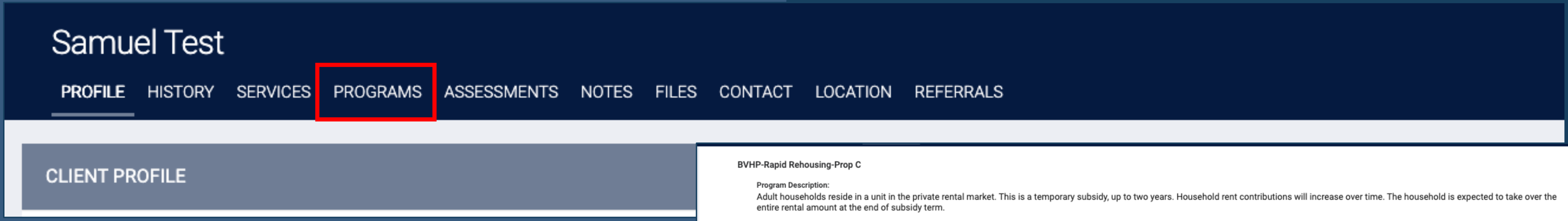
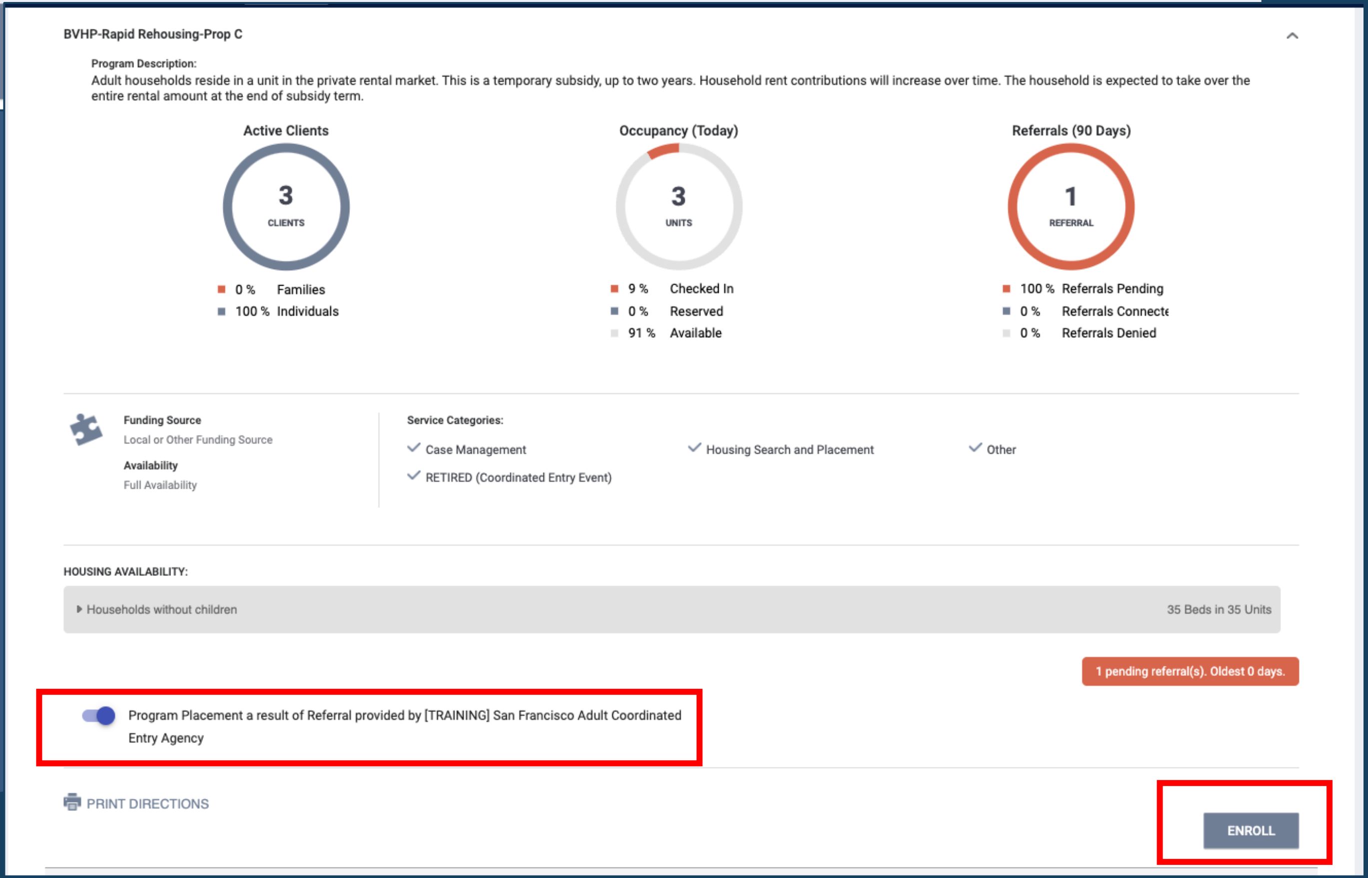
Program Enrollments



- Enrolling a client into your program accepts the Community Queue Referral.
- Be sure to keep toggle on to link referral to program enrollment.



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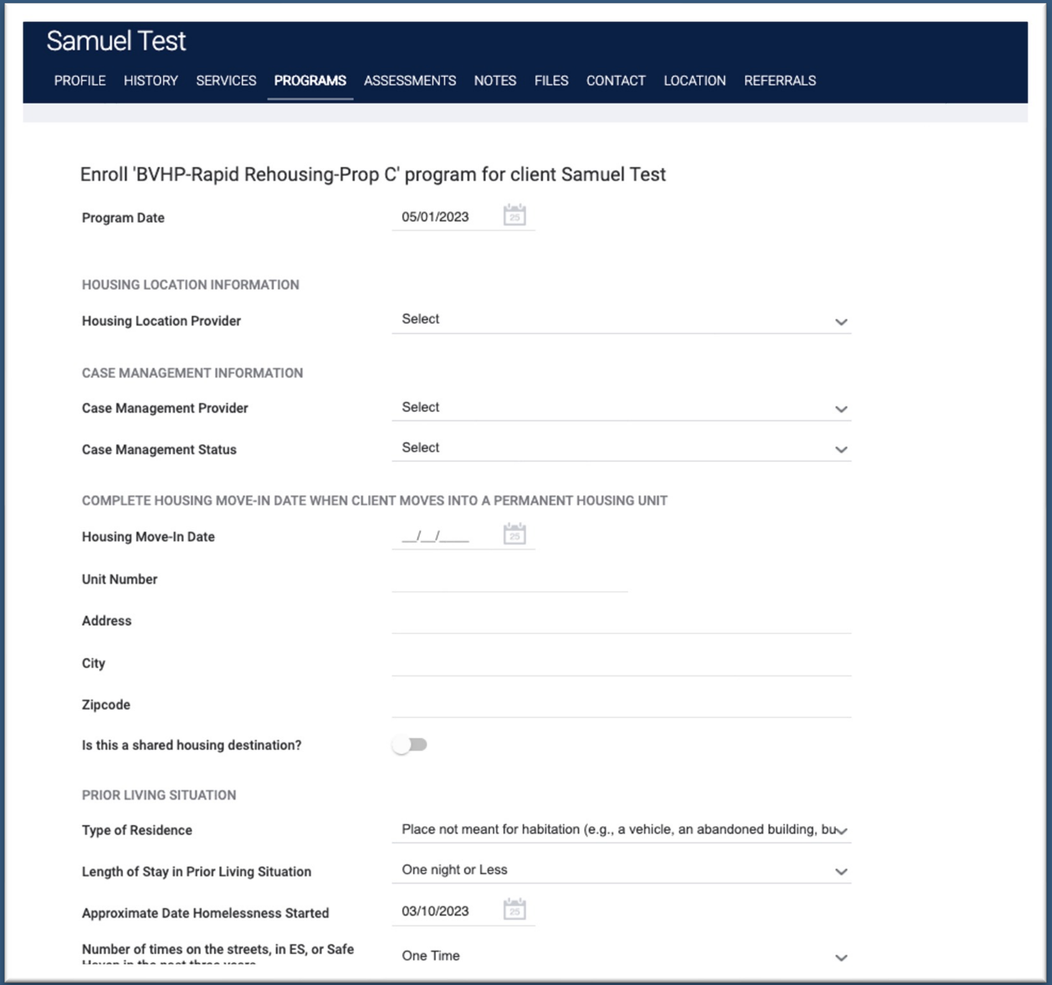
Program Enrollments: Enrollment Form

- Project start date is the date client enrolled into housing navigation services
- Leave housing move-in date information blank for now
  - Information to be completed when client moves into permanent housing



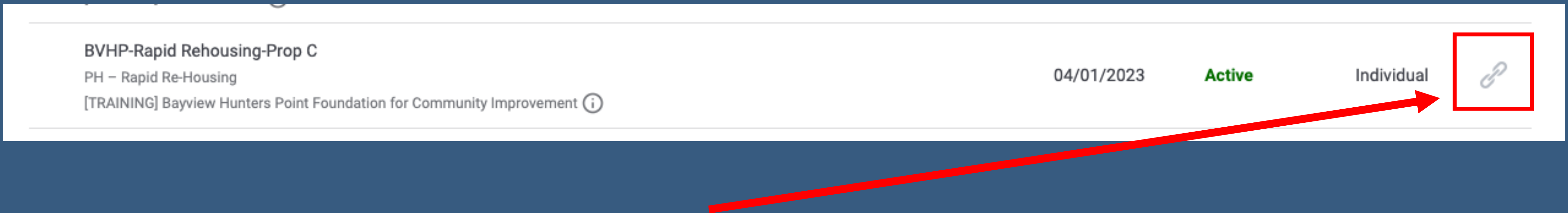
Program Enrollments: Enrollment Form

When enrolling a client, please keep in mind…

- Client information may cascade forward from other program enrollments - it's important to always confirm that all details are still up-to-date and accurate, and to update if necessary

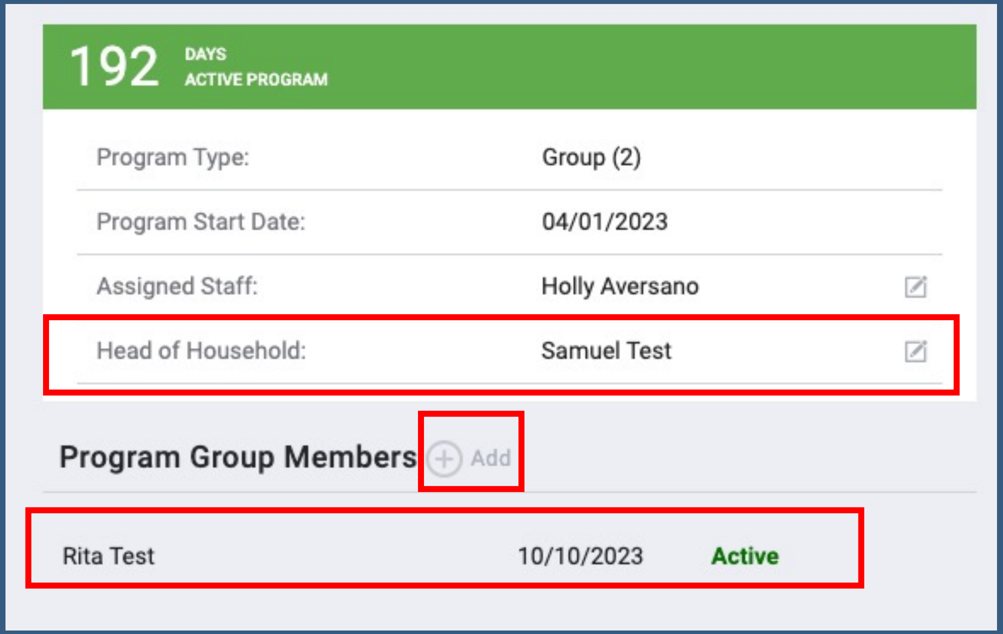
How do I know if I enrolled my household correctly?

- Tip: Check the program enrollment under the 'Programs' tab
  - If the enrollment has a link symbol, you can be sure that the enrollment is linked to the referral



Adding a New Member to an Enrollment

- Important note: To add an additional member to a program enrollment, the additional member must be added as a Household Member at the client's profile
- Steps to add an additional member to a client enrollment:
    1. Click to edit the client profile
    2. Click the Add button next to Program Group Members on the sidebar
    3. Toggle on the Household Members you'd like to add to the enrollment
    4. Complete and save each Household Members' enrollment form as prompted
        a) Be sure to select the appropriate selection for the "Relationship to Head of Household" question
    5. See Enrollment household members in the Program Group Members sidebar
- Be sure that the Head of Household is designated in the enrollment



Keeping Client Households Up-to-date Matters…

- It's very important to keep household compositions accurate in ONE
  - Impacts on reporting, resource allocation, system's ability to best serve the household, etc
- Important to keep up with household composition fluctuations over time
  - Example: Someone in the household has a baby → Make a new profile for the baby as soon as you can and add them to the household
  - Example: A member of a household leaves the household or is incarcerated or hospitalized for a very long period of time → Remove them from the household

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QUICK POLL!

True or false? A “link” icon indicates an **incorrect** referral.

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QUICK POLL!

What should you do if a “link” icon is **missing** from your enrollment?

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10 MINUTE BREAK!

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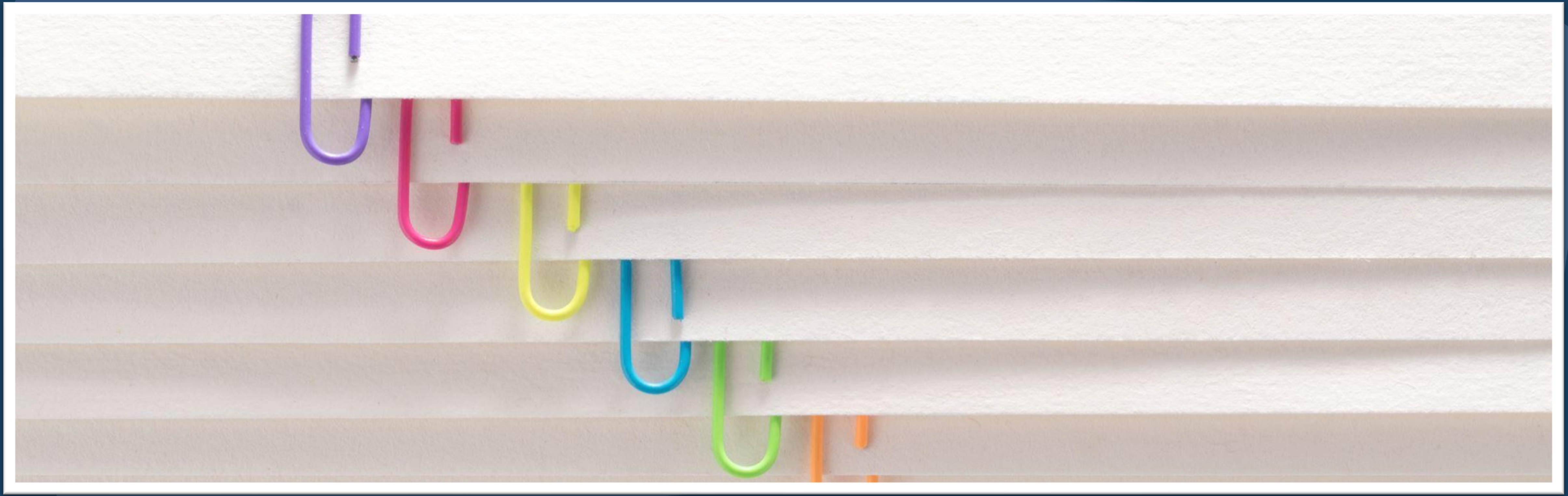

Services

A quick note about services standardization

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Outreach Services

- **Housing Search**: use this 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
- **Housing Search Hold**: use when a referral is in the housing search process and encounters barriers to housing that places the housing search process on hold
  - *Example: client is admitted into the hospital.*

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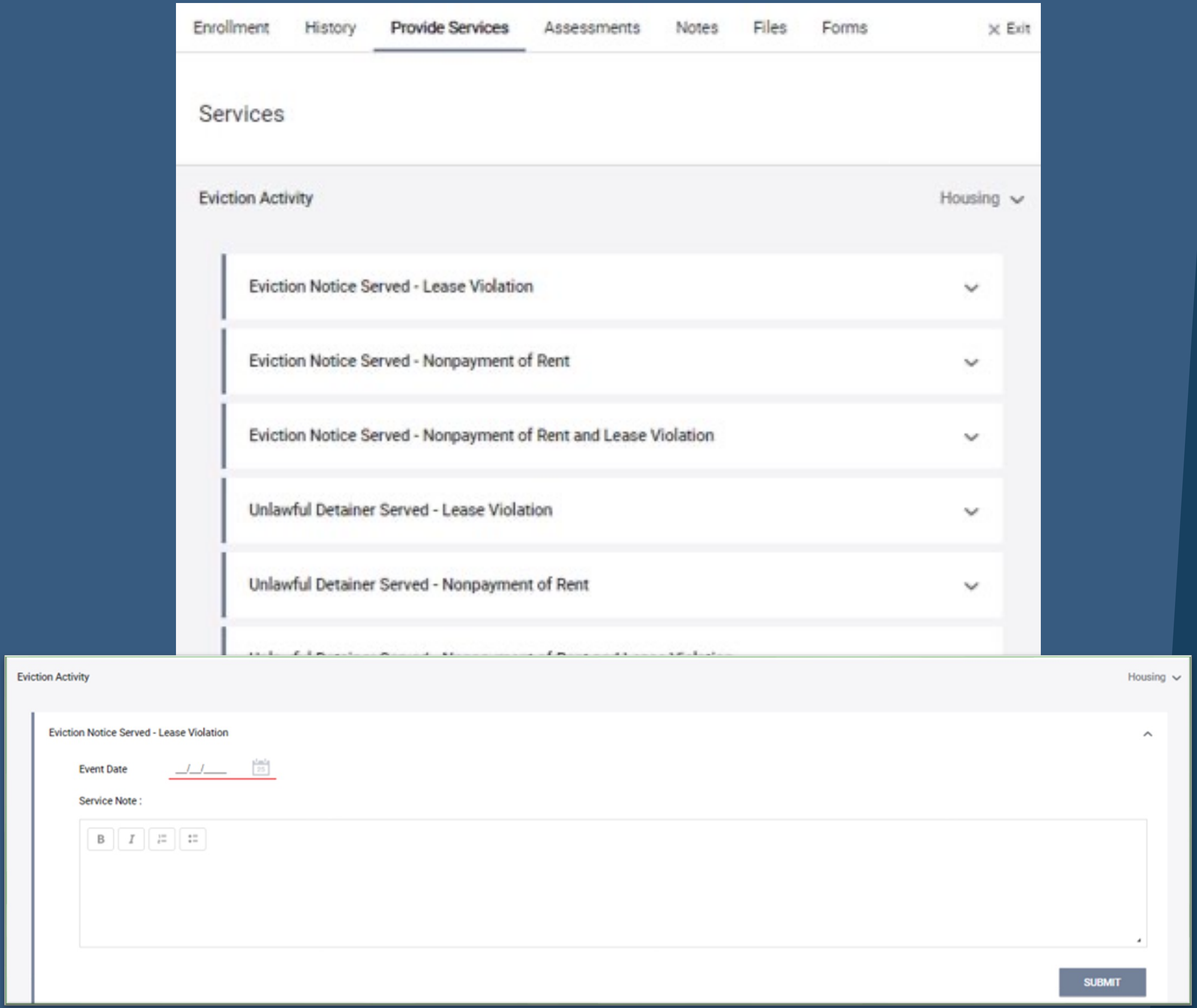
Eviction Activity Services

- Required services that are helpful in gathering trends about our system. HSH uses this data to:
  - Understand Unlawful Detainer (UD) and Eviction trends
  - Analyze equity in eviction data
  - Report trends to the Board of Supervisors
- Can be found under the Provide Services tab under client's enrollment
- Event Date = the date the notice or UD was served on the tenant



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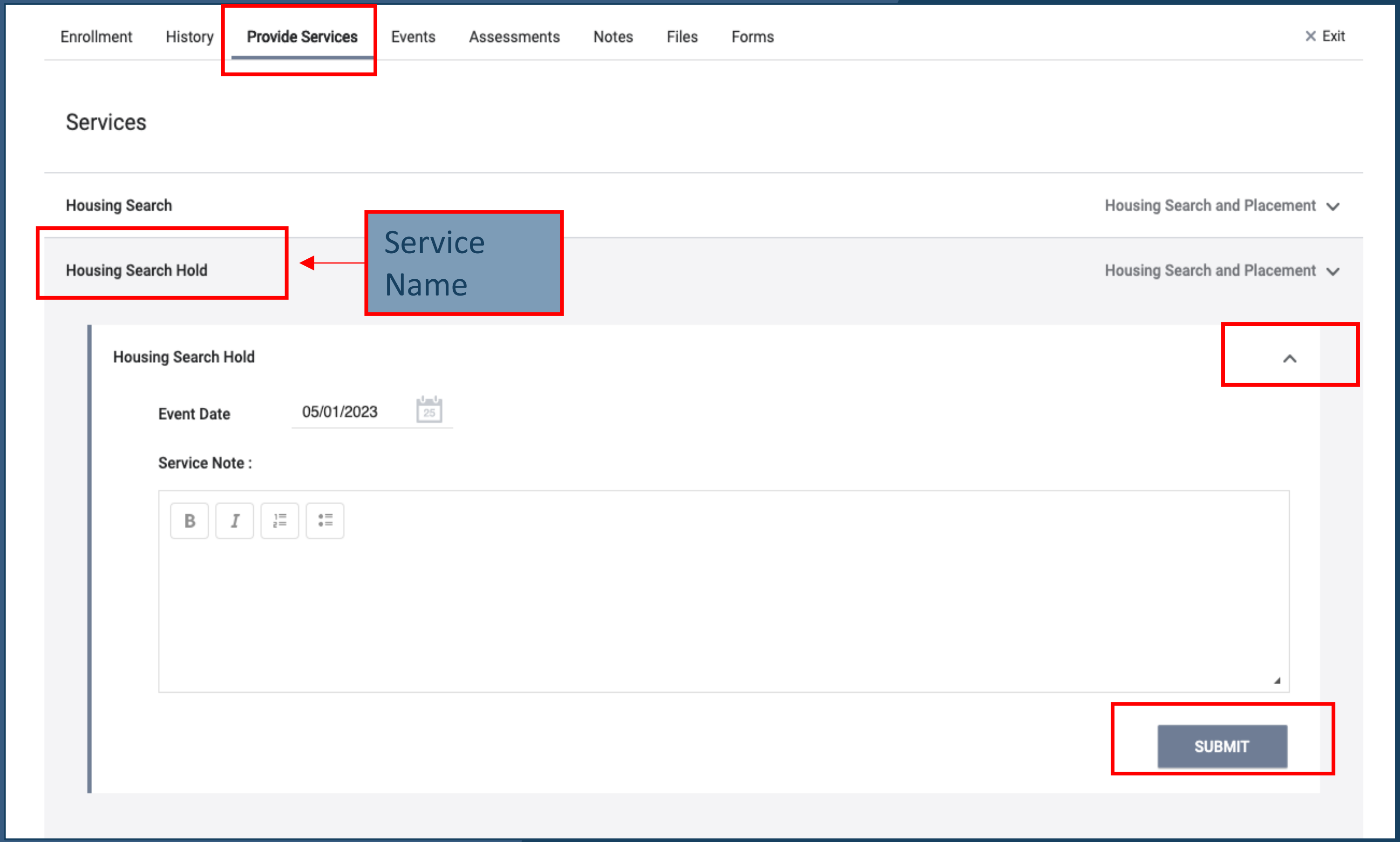
How to Submit a Service

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
6. Find Submitted Service in the History tab within program enrollment



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QUICK POLL!

True or False? Right now, services are **standardized** across programs.

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QUICK POLL!

True or False? Entering services is **optional** for my agency.

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Housing Move-In Date

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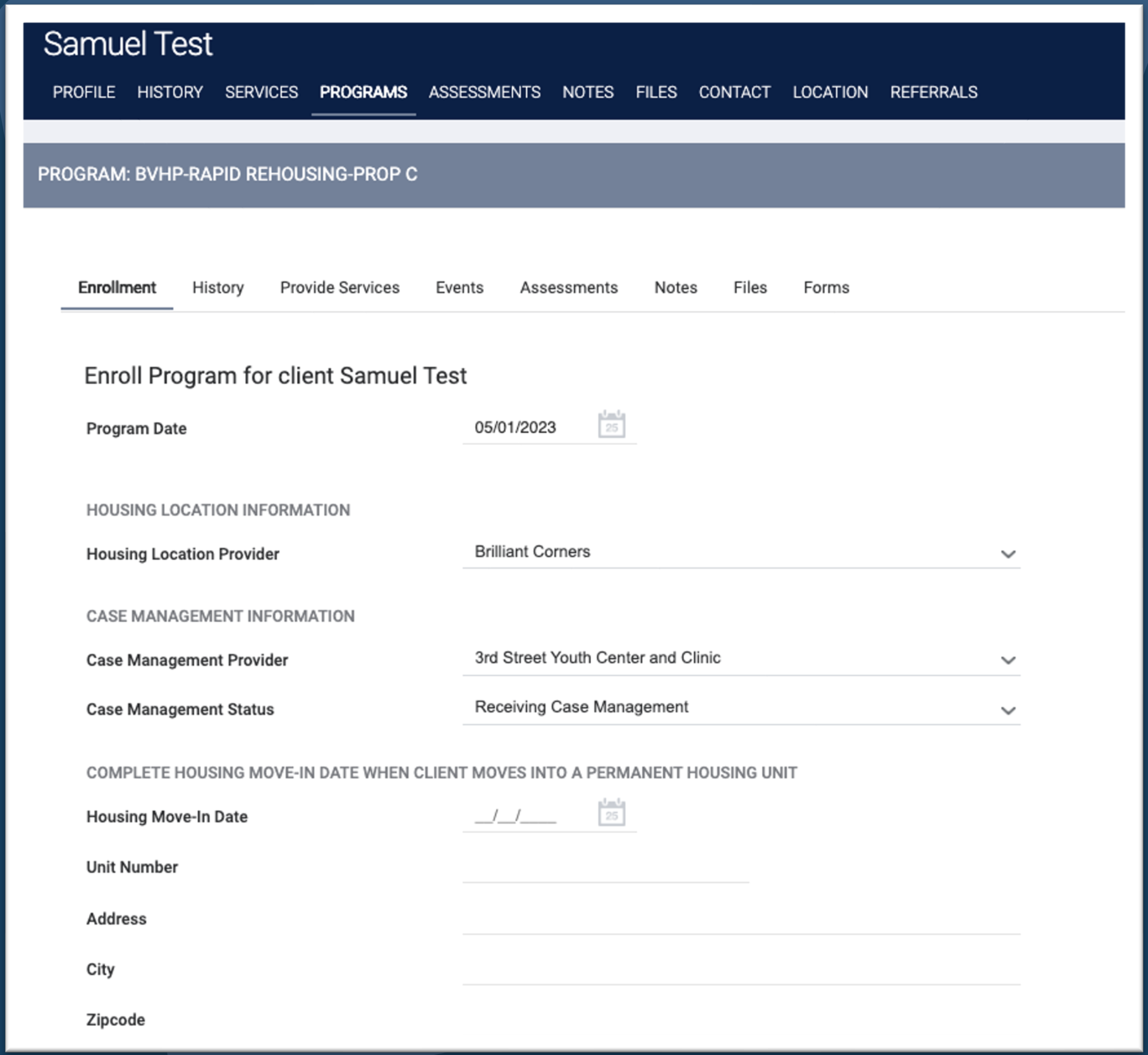
Housing Move-in Date

When a client signs a lease for housing, record the move-in date in ONE:

1. Click on ‘Programs’ tab
2. Click on the icon to open the program
3. Click on 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



Housing Move-in Date Reminders

- When a household transfers from one program to another:
  - Make sure that the housing move-in date is the same as the Program Start Date for the new program
- When a household relocates from one address to another within the same program:
  - Do not change housing move-in date. Only address needs to be changed.

Note that the housing move-in date should never be before the program enrollment date.

QUICK POLL!

When a household transfers from one program to another while housed, what should the **move-in** date be?

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QUICK POLL!

When a household relocates to a different unit within the same program, what should the **move-in** date be?

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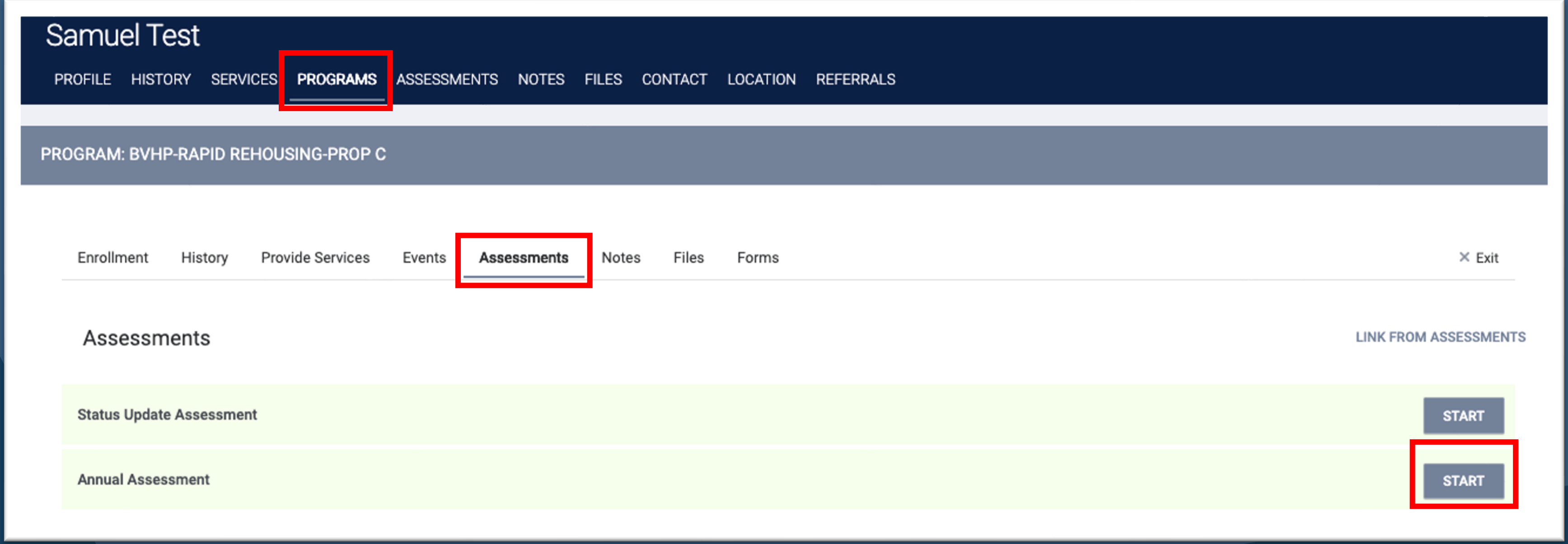
Annual Assessments

Annual Assessments

Complete yearly to update client information that may have changed since enrollment

1. Open program
2. Click on ‘Assessments’ tab
3. Click the ‘Start’ button on the Annual Assessment
4. Update information in the assessment
5. Click ‘Save & Close’ at the bottom of the assessment to save



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QUICK POLL!

True or False? Annual assessments are **optional** for my agency.

QUICK POLL!

How do you know an Annual Assessment is **due** for a client?

Breakout Room #2 (10 minutes)

- ⇢You will enter a 3-4 person breakout room
- ⇢Step 1: Each group member opens the ONE System on their own computer, searches for an active client, and clicks on the "Services" tab
- ⇢Step 2: Group members take turns sharing their screens and comparing what Services exist between their programs
- ⇢Step 3: Group members open an Annual Assessment (either a completed one OR a new one) to see what it looks like.

**IMPORTANT: Do not actually make changes to client profiles

- ⇢Step 3: Group discussion.
  - ⇢Question: How often do you enter ONE System "Services" for your clients now? What do you use this tab for?
  - ⇢Question: How do you ensure that client ONE System Annual Assessments are completed on time?

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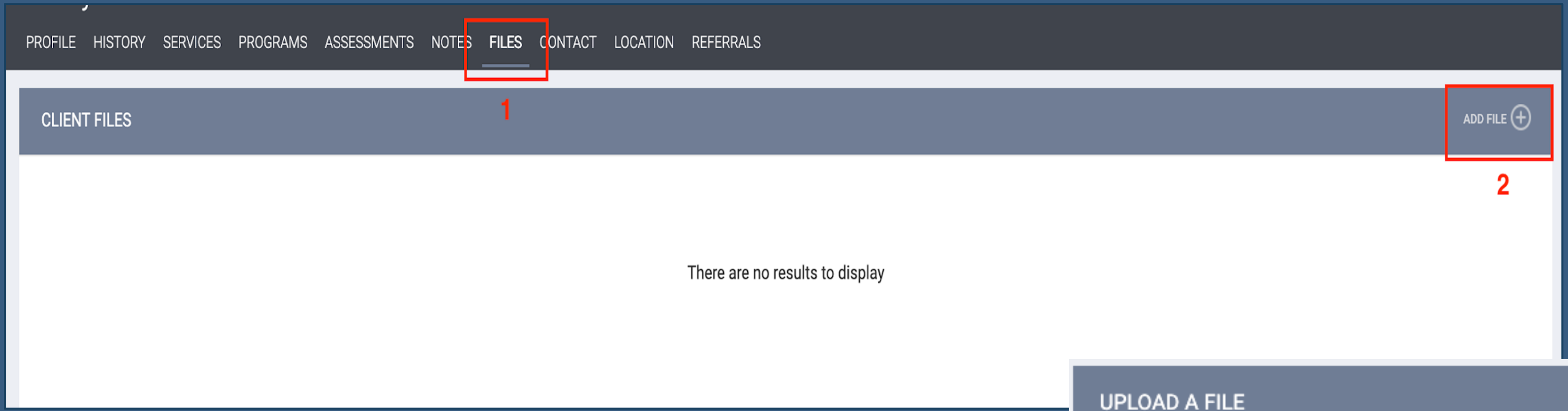
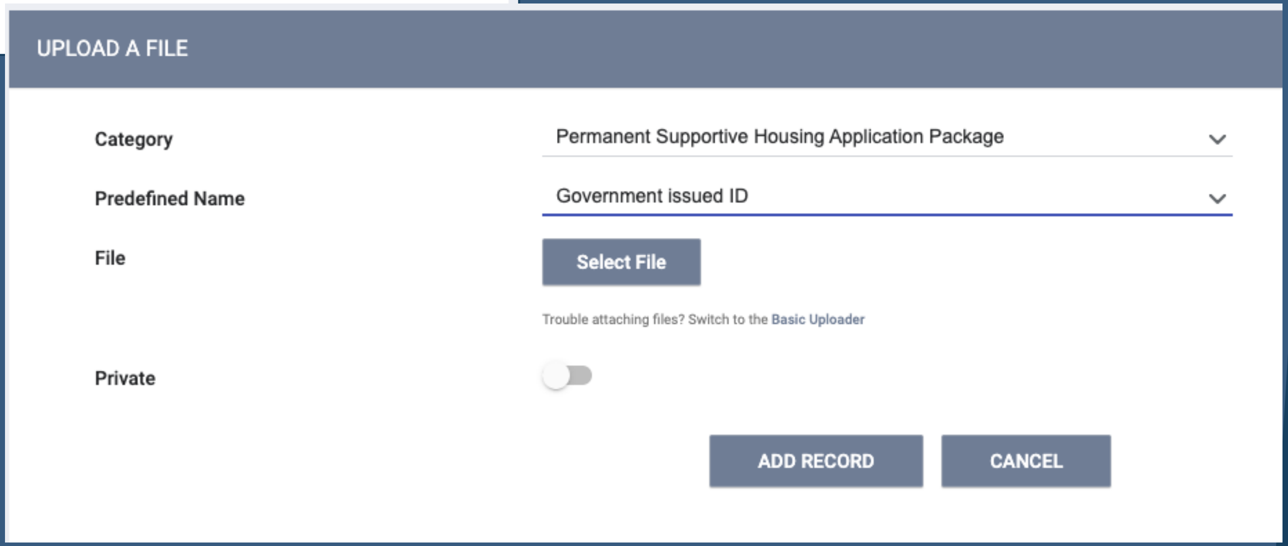
Uploading Documents

Uploading Documents into ONE

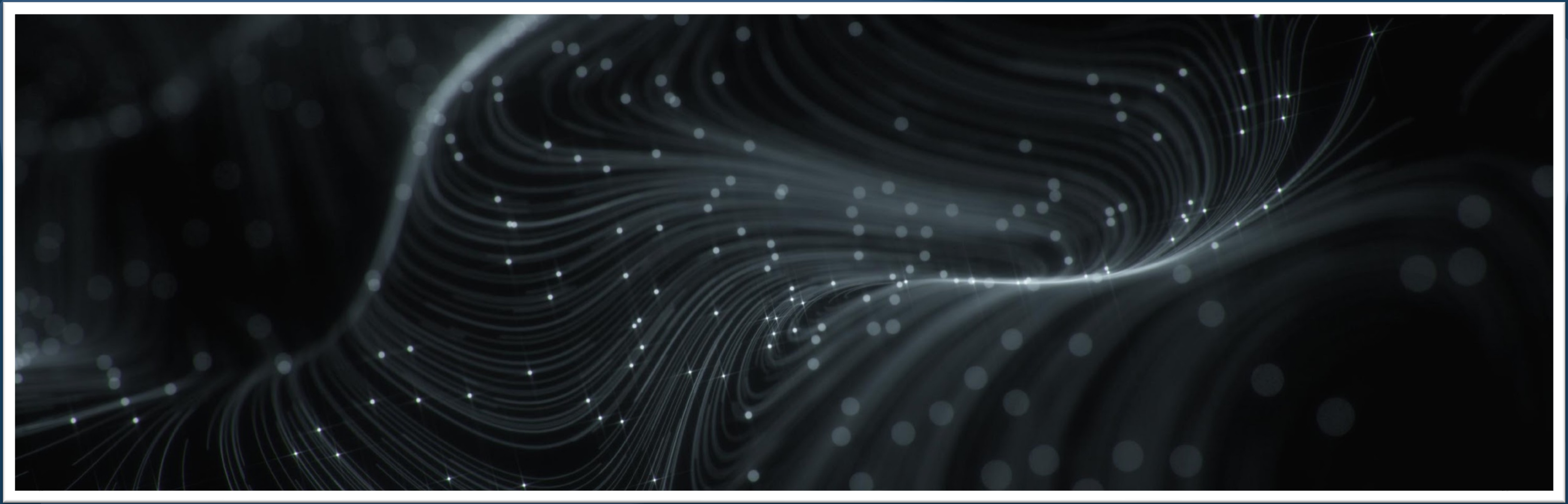


- The Files Tab is a helpful place to store client documents important for housing search, such as an ID or Proof of Income



Tips: Uploading Documents into ONE

- Be sure to upload files under the correct category
  - For EHV programs, files must be uploaded under “SFHA Master Application”
- Use the “basic uploader” when uploading files that are a larger size.
- Always shrink the size of a PDF file first before uploading

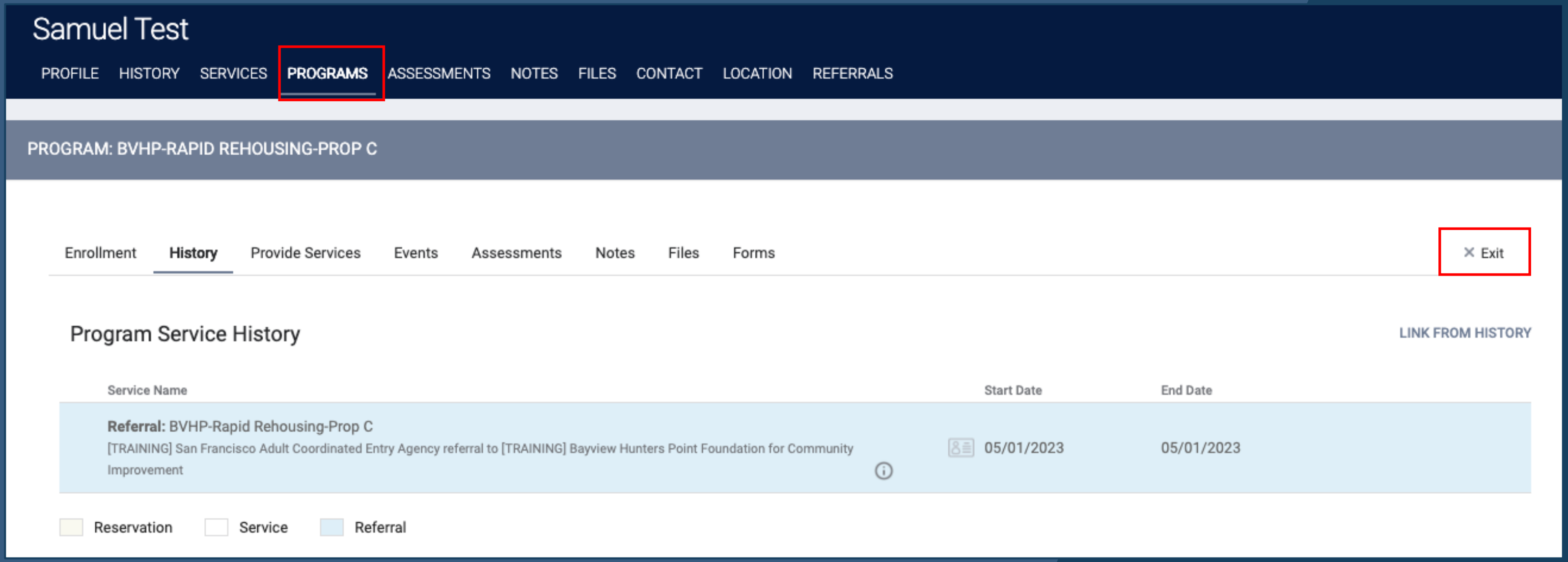


Program Exits

Program Exits

When client leaves your program, record the exit in ONE:

1. Click on ‘Programs’ tab
2. Click on the  icon to open the program
3. Click on the ‘Exit’ button in the top right-hand corner
4. Review cascaded information
5. Scroll down and click ‘Save & Close’ to save changes



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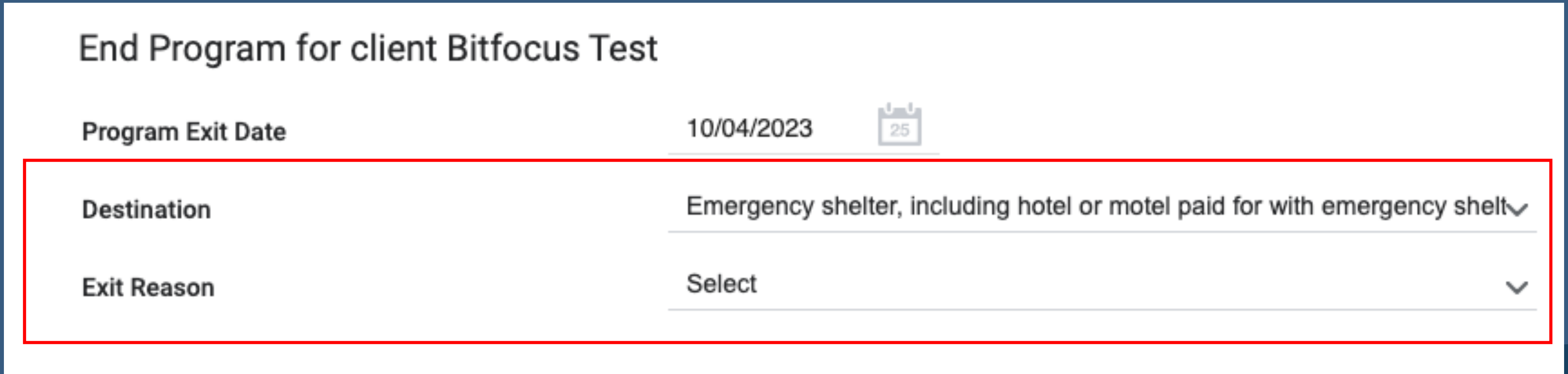
Exit Form: Exit Reason and Exit Destination

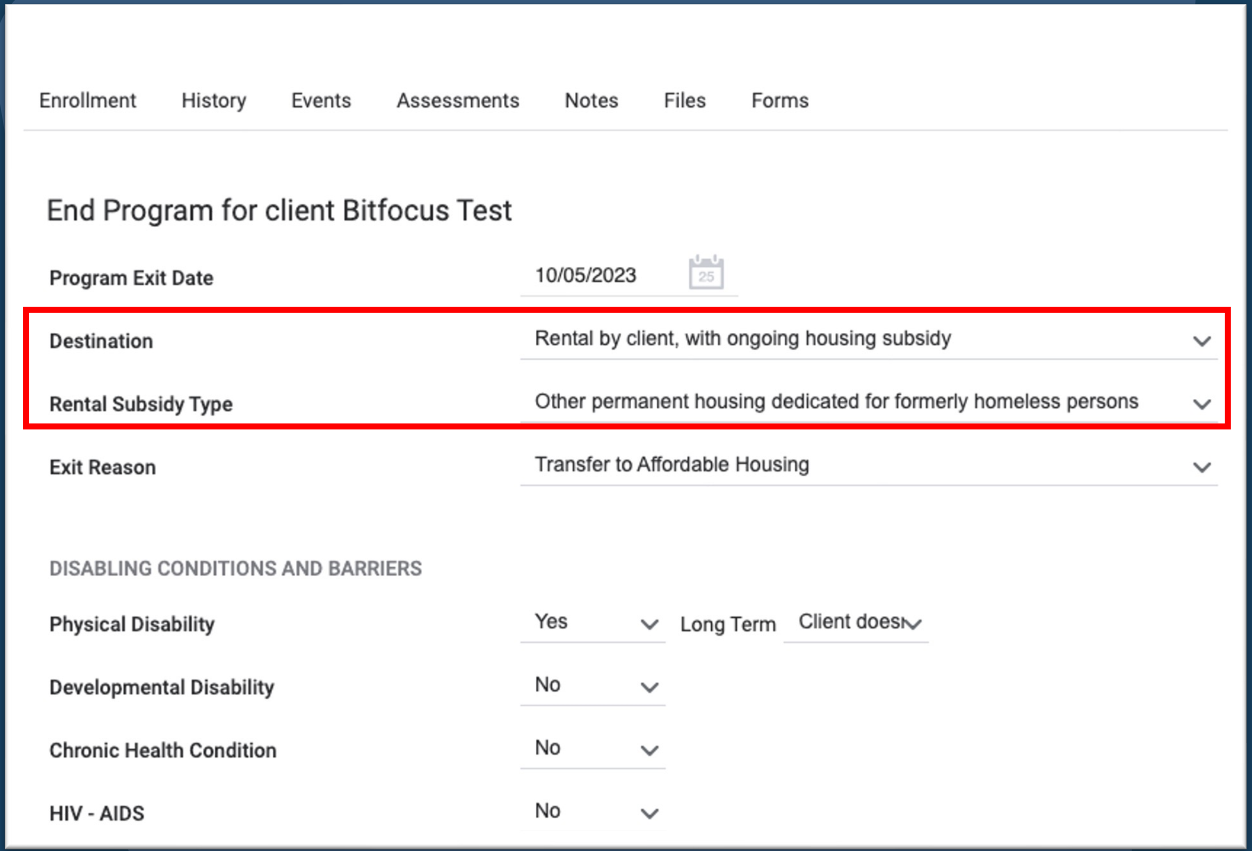

End Program for client Bitfocus Test

Program Exit Date 10/04/2023

Destination Emergency shelter, including hotel or motel paid for with emergency shelt

Exit Reason Select

- Important data elements to help system understand what happens to clients upon exiting a program
- Complete as accurately as possible for each client exiting your programs
- Reminder: Clients should never be exited from your Scattered Site program due to Eviction



New Field: Rental Subsidy Type

- 2024 HUD Data Standards Update
- When "Rental by client, with ongoing housing subsidy" is selected, a new dependent field will appear: Rental Subsidy Type
- Reorganizes many of the subsidy options and adds in a few additional ones
  - Select if a client is transferring to another rental subsidy program, i.e. PSH

Review our online Tip Sheet for more information!

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QUICK POLL!

True or false? Filling out an exit destination is **mandatory**?

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QUICK POLL!

True or false? Clients can be exited due to **eviction**?

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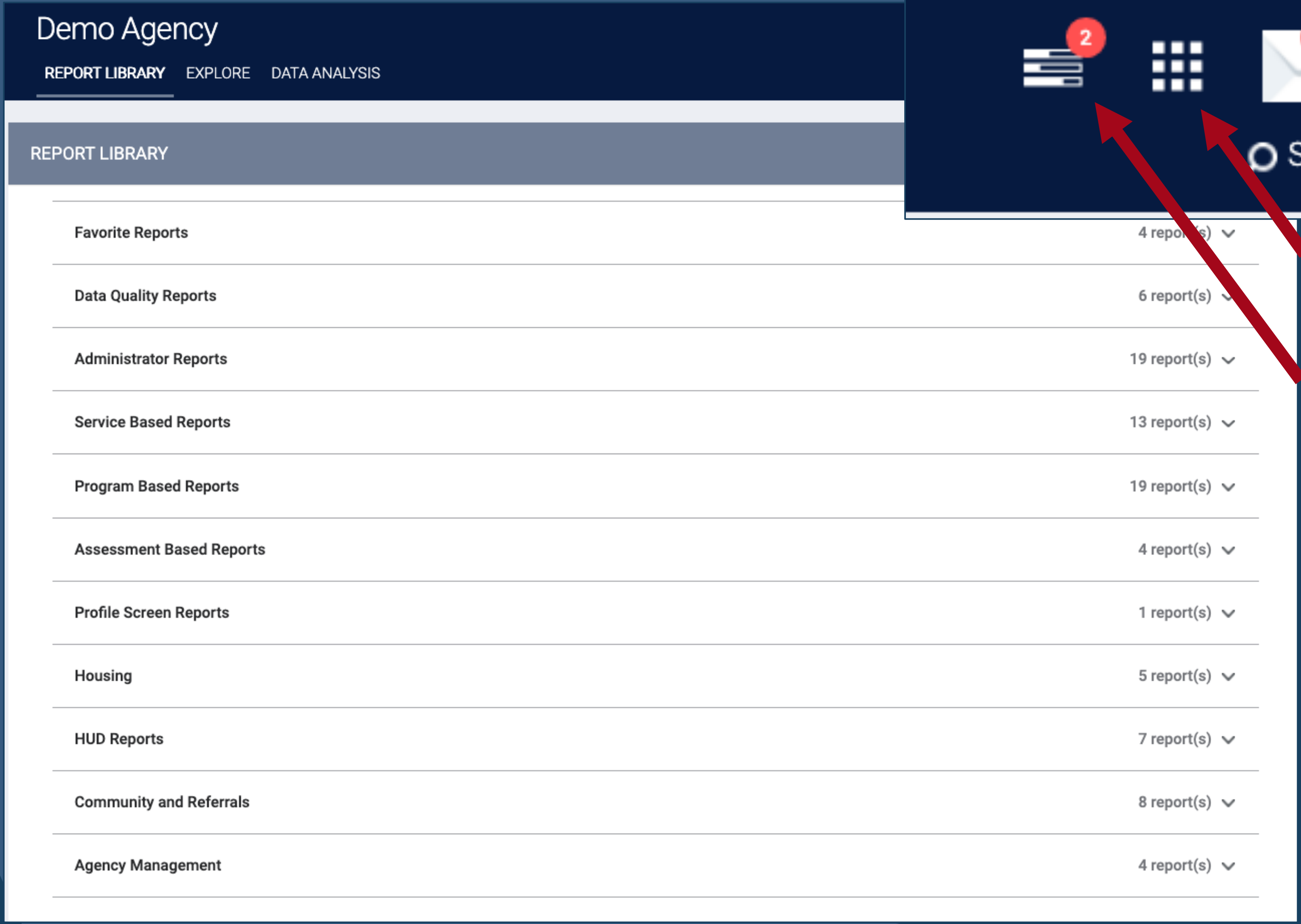
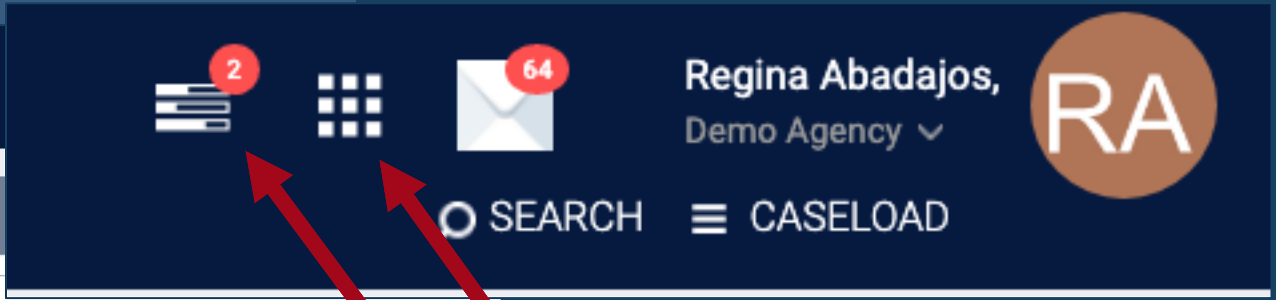
Reports Library





Launch Pad: Report Library

Report Queue: Shows processing and completed reports.

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Reports

[GNRL-106] Program Roster (Program Based Report)

- Gives information on clients who have stayed or are currently staying in your program
- Can help highlight which clients need to have their Housing Move-in Date filled in

Program Roster Report

Demo Agency
Active within [12/01/2019 - 11/30/202(

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = 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
Program: Arches Navigation Center												
Fever, Cedar	F32DE8A0A	11/30/1999	20	21	01/21/2020	-	0		0	0	0	S. Hoffman

Number of Clients:
Number of Households:

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Coordinated Entry Access Point												
Canyon, Bryce	AAFEF1344	09/12/1979	40	41	01/02/2020	-	334		0	0	0	S. Hoffman

Number of Clients:
Number of Households:

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Street Outreach Program												
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:

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Zion Housing												
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)

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Reports

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

- Comprehensive data review
- Highlights where data entry errors may have occurred

HMIS Data Quality Report [FY 2020]

CA-501 - San Francisco CoC: Demo Agency
CoC Category Filter: Agency Co(
Report period 12/01/2019 - 11/30/202

Q1. Report Validation Table
Program Applicability: All Projects

Total number of persons served	10
Number of adults (age 18 or over)	8
Number of children (under age 18)	2
Number of persons with unknown age	0
Number of leavers	2
Number of adult leavers	2
Number of adult and head of household leavers	2
Number of stayers	8
Number of adult stayers	6
Number of veterans	2
Number of chronically homeless persons	3
Number of youth under age 25	2
Number of parenting youth under age 25 with children	0
Number of adult heads of household	8
Number of child and unknown-age heads of household	1
Heads of households and adult stayers in the project 365 days or more	2

Q2. Personally Identifiable Information (PII)
Program Applicability: All Projects

Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	Total	% of Error Rate
Name (3.1)	0	0	0	0	0%
Social Security Number (3.2)	0	0	4	4	40%
Date of Birth (3.3)	0	0	1	1	10%
Race (3.4)	0	0		0	0%
Ethnicity (3.5)	1	0		1	10%
Gender (3.6)	0	0		0	0%
Overall Score				4	40%

Q3. Universal Data Elements
Program Applicability: All Projects

Data Element	Error Count	% of Error Rate
Veteran Status (3.7)	0	0%
Project Start Date (3.10)	0	0%
Relationship to Head of Household (3.15)	1	10%
Client Location (3.16)	0	0%
Disabling Condition (3.8)	1	10%

Q4. Income and Housing Data Quality
Program Applicability: All Projects

Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0%
Income and Sources (4.2) at Start	5	55.56%
Income and Sources (4.2) at Annual Assessment	2	100%
Income and Sources (4.2) at Exit	0	0%
Non-Cash Benefits (4.3) at Start	5	55.56%
Non-Cash Benefits (4.3) at Annual Assessment	2	100%
Non-Cash Benefits (4.3) at Exit	0	0%

Q5. Chronic Homeless
Program Applicability: ES, SH, Street Outreach, TH & PH(All)

Starting into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.9.17.3) Missing	Number of times (3.9.17.4) DK/R/missing	Number of months (3.9.17.5) DK/R/missing	% of records unable to calculate
ES, SH, Street Outreach	1			0	0	0	0%
TH	2	0	0	0	0	0	0%
PH (all)	4	0	1	0	0	0	25%
Total	7						14.29%

Q6. Timeliness
Program Applicability: All Projects

Time for Record Entry	Number of Project Start Records	Number of Project Exit Records
0 days	6	2
1-3 days	1	0
4-6 days	0	0
7-10 days	0	0
11+ days	0	0

Q7. Inactive Records: Street Outreach and Emergency Shelter
Program Applicability: Street Outreach & ES-Night By Night

Data Element	# of Records	# of Inactive Records	% of Inactive Records
Contact (Adults and Heads of Household in Street Outreach or ES-NbN)	0	0	0%
Bed Night (All clients in ES-NbN)	0	0	0%

rograms Included in Dataset

Agency	Program Name
Demo Agency	Arches Navigation Center
Demo Agency	Coordinated Entry Access Point
Demo Agency	Denali Transitional Housing
Demo Agency	Evergreen Family Individual Room Shelter
Demo Agency	Housing Ladder
Demo Agency	Problem Solving
Demo Agency	Street Outreach Program
Demo Agency	Yellowstone Congregate Shelter
Demo Agency	Zion Housing

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QUICK POLL!

What report will give you a **list** of everyone active in your program in a certain period of time?

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QUICK POLL!

What report shows you all your **data quality** errors?

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Resources

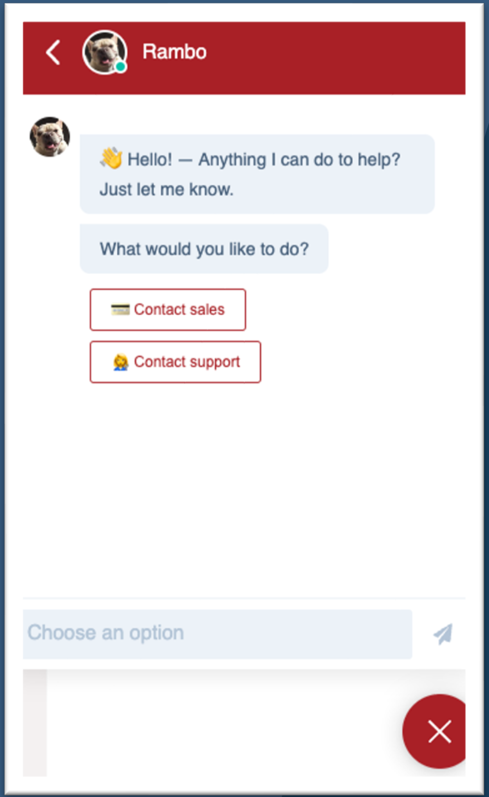
Bitfocus Help Desk

- onesf@bitfocus.com
- 415.429.4211

ONESF Help Center Website:

onesf.bitfocus.com

Help Desk Widget (In ONE System and on ONESF Help Center Website)



When should I go to the Help Desk?

Example scenarios:

- I accidentally enrolled a client into a program that they shouldn't be enrolled in!
- I didn't mean to enter that service, and now I need it to be deleted. Help!
- Oopsie! I uploaded the wrong file to a client profile and now I need that file to be deleted.
- The client is enrolled in my program but the referral is still open. How can I close the referral and link it to my client's program enrollment?

And much more! Feel free to reach out to the Help Desk with any situation that is difficult to resolve on your own!

QUICK POLL!

True or False? I need to ask my HSH Program Manager before I email the **Bitfocus help desk**.

Breakout Room #3 (5 minutes)

- You will enter a 3-4 person breakout room
- Step 1: Pick a group leader to run a demonstration!
- Step 2: Group leader shares their screen and opens the ONE System
- Step 3: Group members talk through how to find and download useful program reports, including a Program Roster and a Data Quality Report.
- Step 3: Group discussion.
  - Question: How often do you use the ONE System reports? Which ones?
  - Question: What problems have you encountered when uploading files? Did this training help clarify how to properly upload files?

CONCLUSIONS!

Please fill out the **attendance** survey

Please fill out the **feedback** survey

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