



THP Plus ONE System Provider Training

Today's Agenda

Welcome & Introductions

Creating a profile in ONE

Release of Information

Enrollments

Notes

Exits

Reporting

Resources/Questions & Wrap up

Creating a Profile in ONE

Creating New Profiles in the ONE system

Search the client within the ONE system to be sure that a profile for your agency doesn't already exist

- > Search for household/ head of household
- > Search by name, DOB and SSN

If no profile exists, create a new profile by clicking the Add Client button

Complete the fields that the client feels comfortable sharing. It helps tell their story and ensure that staff using the system know the appropriate information for the client.

- > If a client chooses not to answer a specific question, use **"Client prefers not to answer"**
- > If the client does not know the answer, use **"Client doesn't know"**
- > **"Data not collected"** should only be used in the case that question was not asked

SEARCH FOR A CLIENT

ADD CLIENT +

Enter search terms for a client

SEARCH

Use full name, partial name, date of birth or any combination.

CREATE A NEW CLIENT

Social Security Number

Quality of SSN

Last Name

First Name

Quality of Name

Quality of DOB

Date of Birth

Middle Name

Alias

What is the client's current gender identity?

What is the appropriate pronoun to use when addressing the client?

Race and Ethnicity

Additional Race and Ethnicity Detail

Primary Language

Secondary Language

Suffix None

Release of Information (ROI)

Homeless Response System Release of Information

- > Explains how client information is collected in the ONE System, as well as how that info is used by or shared to housing and service providers
- > Must be signed by the client and uploaded into the ONE system
- > If a client refuses to provide consent, a ONE system profile may not be created



San Francisco Department of Homelessness & Supportive Housing

Homelessness Response System Authorization for Use or Disclosure of Information

This form and the attached notice describe how personal information about you may be used and shared by the City and County of San Francisco's Department of Homelessness and Supportive Housing (HSH) and its provider organizations, and the rights you have about your information.

The San Francisco Department of Homelessness and Supportive Housing's (HSH) Online Navigation and Entry (ONE) System (the City's Homeless Management Information System) is a database that allows HSH to save, access, and share client level information with our Partner agencies, which are San Francisco City Departments, including the Department of Public Health and the Human Services Agency, and other community-based housing and service providers who work with people experiencing, or at risk of experiencing, homelessness. Examples include the SF Homeless Outreach Team (SFHOT) or service providers in supportive housing.

To be able to best help you, information is collected in the ONE System and used by or shared with Partner agencies. Partner agencies use the information in the ONE System to:

- Match clients to appropriate housing and other services they might be able to receive
- Improve coordination of your care and related services between City agencies and providers; and

Release of Information in ONE

When creating a new profile, ONE will prompt you to have the household sign a Release of Information

- Electronic Signature (preferable method)
- Verbal Consent only to be used if physical signature couldn't be obtained due to working remotely with clients

RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	05/15/2024	25
End Date	05/15/2027	25
Documentation	▼ ✓ Select Electronic Signature Verbal Consent	

ELECTRONIC SIGNATURE FORM

By completing this form, you are certifying the client:

- 1) was notified of the Department of Homelessness and Supportive Housing Notice of Privacy Policy
- 2) completed the Release of Information: Homeless Response System as required for the ONE System

Any signed Release of Information forms must be uploaded in client files.

SAVE CANCEL

Release of Information in ONE

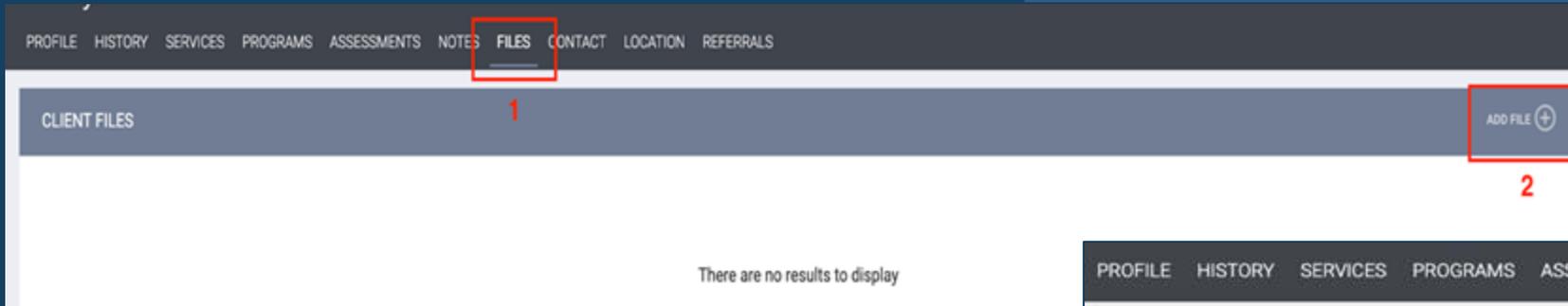
- ONE will prompt for a Release of Information to be completed when a client profile is created and must be updated every 3 years
- Profiles with missing or expired Releases of Information will be flagged with a yellow banner

▲ 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 & active ROI recorded both as:
 - A **file** uploaded into client profile
 - An **electronic signature** recorded in Client Privacy section of client profile (shield icon)

Start Date	End Date	Version	
08/06/2019	08/06/2022	V.1	
09/20/2022	09/20/2023	V.4	

Uploading an ROI as a File in ONE



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

UPLOAD A FILE

Category Release of Information

Predefined Name Release of Information: Homeless R

File [Select File](#)

Trouble attaching files? Switch to the Basic Uploader

Private

[SAVE CHANGES](#) [CANCEL](#)

To upload an ROI:

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

Uploading Files

---> In addition to ROIs, able to upload other vital documents into ONE, including:

- > IDs
- > Social Security cards
- > Proof of Income
- > Birth Certificate
- > Etc

---> Follow the same steps from previous slide

- > Category will depend on type of document uploaded

The screenshot shows a web application interface for uploading a file. At the top, there is a navigation bar with the following menu items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES (highlighted), REFERRALS, CONTACT, and LOCATION. Below the navigation bar is a header for the form: 'UPLOAD A FILE'. The form contains the following fields and controls:

- Category:** A dropdown menu with 'Personal Identification' selected.
- Predefined Name:** A dropdown menu with 'Government Issued Identification' selected.
- File:** A 'Select File' button.
- Private:** A toggle switch that is currently turned off.

Below the 'Private' toggle, there is a link: 'Trouble attaching files? Switch to the Basic Uploader'. At the bottom right of the form, there are two buttons: 'ADD RECORD' and 'CANCEL'. At the very bottom of the page, there is a small footer: 'Managed with Clarity Human Services'.

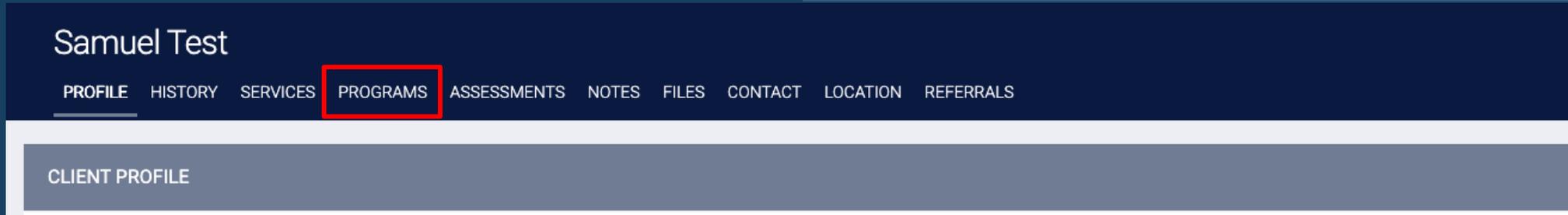
ROI Resources

---> [Online ROI Resources and Forms](#)
(available in English, Chinese, Spanish,
Tagalog)



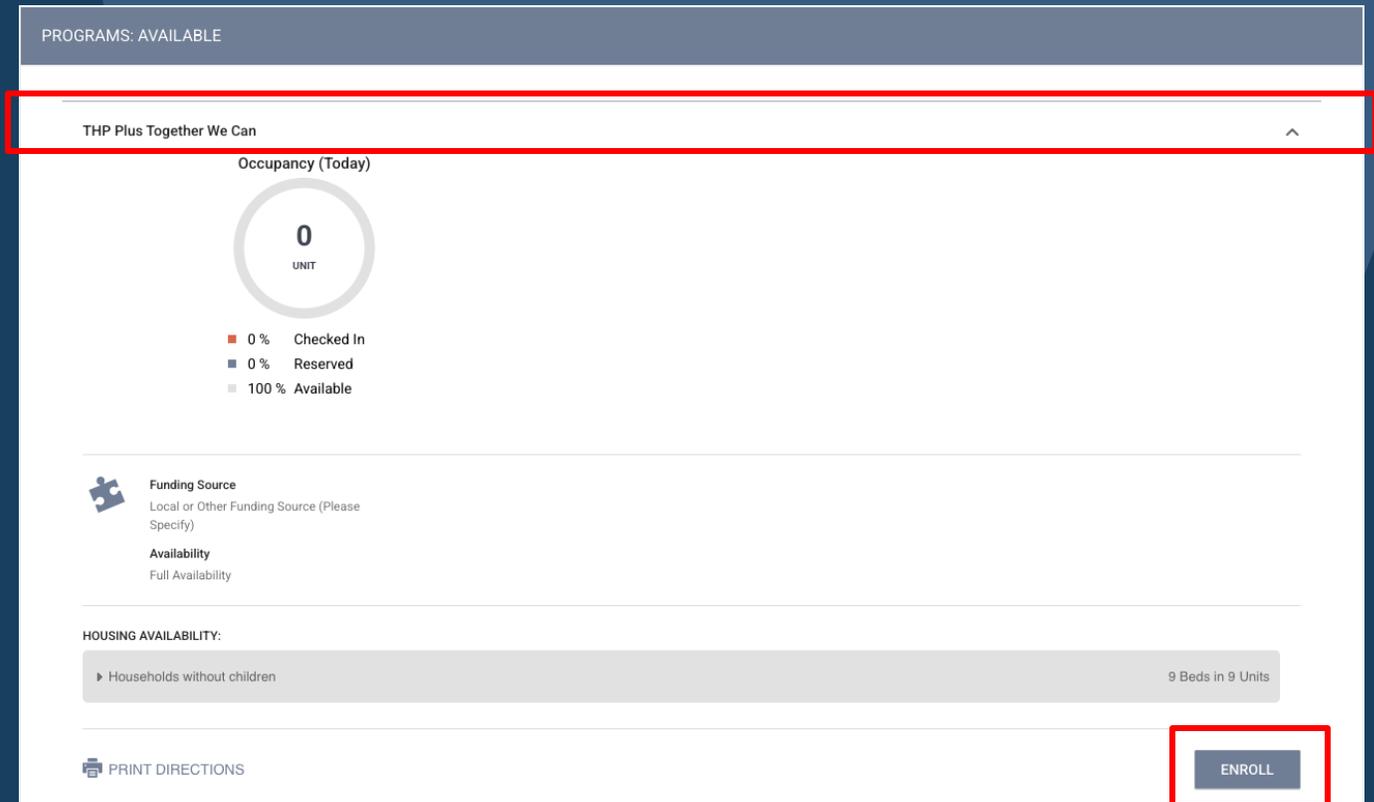
Program Enrollments

Program Enrollments



---> You can enroll them into a THP program by completing the following:

1. Be sure you are switched to the appropriate agency for the program you wish to enroll into
2. Go to the client profile
3. Click on the PROGRAMS tab
4. Scroll down to the Programs: Available section
5. Click on the appropriate THP program name
6. Click Enroll



Program Enrollments: Enrollment Form

- Project Start Date is the date that client enrolled into the program
- Be sure to...
 - Ask all questions and fill in answers as completely as the client is comfortable answering

Henrietta Munster

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

Enroll 'THP Plus Together We Can' program for client Henrietta Munster

Program Date 01/14/2025 

Translation Assistance Needed No

Are you interested in travel and relocation services outside of San Francisco? Select

TEMPORARY SHELTER QUESTIONS

Locker #

Are you Arriving from an Encampment? (Defined as 6 or More Tents/Structures or Inhabited Vehicles/RVs on One Block?) No

Are you Arriving with any Pets? No

Do you have a Partner or Spouse? No

Do you have More than 2 Bags? No

Do you have any Special Accommodations? No

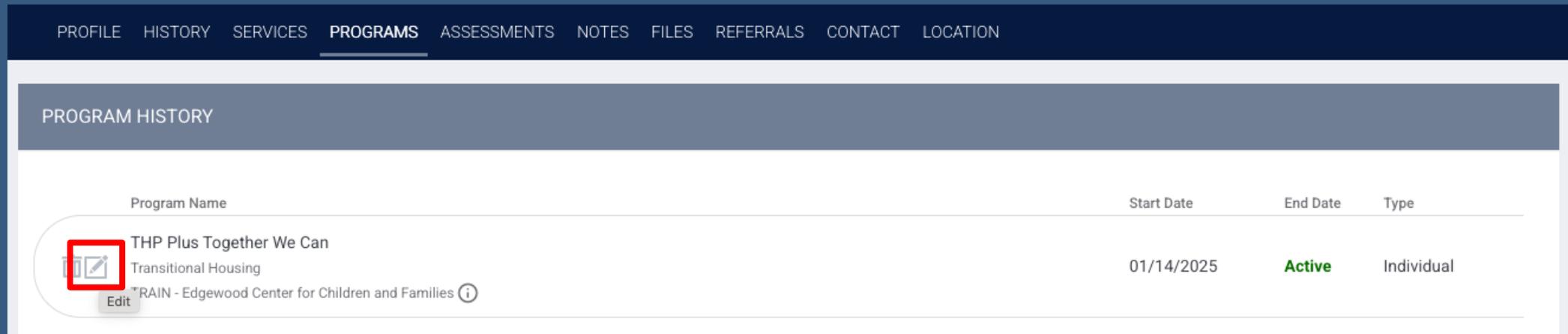
REFERRAL SOURCE

What is the Guest Referral Source? Select

Accessing a program enrollment

---> After a client has been enrolled...

---> Program enrollments are accessible in the Program Tab of the client profile. You can click the pencil icon next to the enrollment you wish to view.



Program Name	Start Date	End Date	Type
 THP Plus Together We Can Transitional Housing RAIN - Edgewood Center for Children and Families ⓘ <small>Edit</small>	01/14/2025	Active	Individual

Program Notes

Program Notes

---> Notes:

- > Are entered within client program enrollment under the notes tab
- > Allow for case management information to be captured and shared with other users

To add a note:

1. Access the THP program enrollment under the 'Programs' tab
2. Click on 'Notes' tab within the enrollment
3. Click 'Add Note'
4. Write note
5. Click 'Add Record' to save note

The screenshot shows a web application interface for 'Henrietta Munster'. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'REFERRALS', 'CONTACT', and 'LOCATION'. Below this, a secondary navigation bar has 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', 'Files', and 'Forms'. The 'Notes' tab is highlighted with a red box. The main content area is titled 'CLIENT NOTES' and contains a form with the following fields:

- Title:** A text input field.
- Category:** A dropdown menu with 'Select' as the current value.
- Agency:** A text field containing 'TRAIN - Edgewood Center for Children and Families'.
- Date:** A date field showing '01/14/2025' and a 'Time Tracking' section with two dropdown menus.
- Note:** A large text area with a rich text editor toolbar containing icons for Bold (B), Italic (I), Bulleted List, and Numbered List.
- Private:** A toggle switch.
- Buttons:** 'ADD RECORD' and 'CANCEL' buttons at the bottom right, with 'ADD RECORD' highlighted by a red box.

Program Exits

Program Exits

To exit a client:

1. Go to client enrollment
2. Click 'Exit' in the top righthand corner of enrollment
3. Complete Exit form and click 'Save & Close'

PROGRAM: THP PLUS TOGETHER WE CAN

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

× Exit

Program Service History [LINK FROM HISTORY](#)

No results found

Reservation Service Referral

The screenshot shows a software interface for a client enrollment. At the top, there is a header bar with the text "PROGRAM: THP PLUS TOGETHER WE CAN". Below this is a navigation menu with tabs for "Enrollment", "History", "Provide Services", "Assessments", "Notes", "Files", and "Forms". The "History" tab is currently selected. In the top right corner of the main content area, there is a button labeled "× Exit" which is highlighted with a red rectangular box. Below the navigation menu, the text "Program Service History" is displayed, followed by a "LINK FROM HISTORY" link. The main content area is mostly empty, with a large, faint, light blue graphic of a stack of papers or documents in the center. Below this graphic, the text "No results found" is displayed. At the bottom of the interface, there are three colored squares with corresponding labels: a light green square for "Reservation", a light blue square for "Service", and a light blue square for "Referral".

Enrollment History Provide Services Assessments Notes Files Forms

End Program for client Henrietta Munster

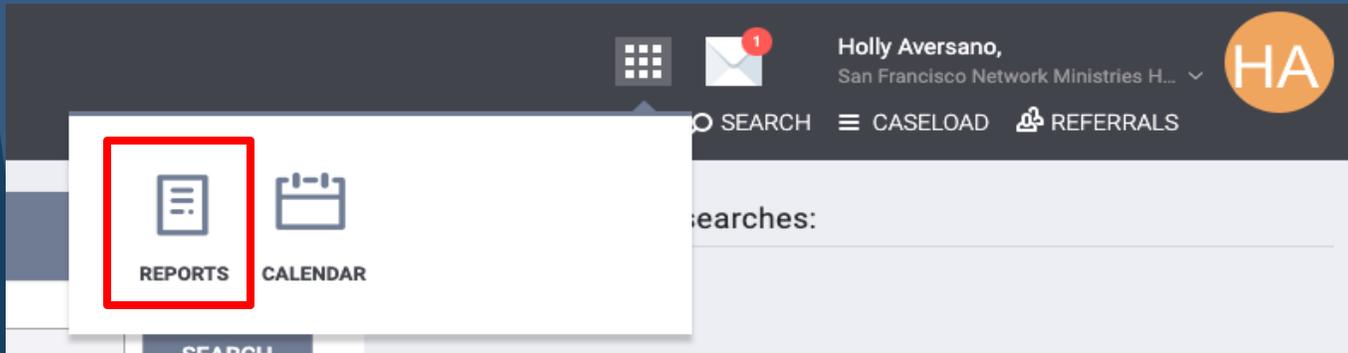
Program Exit Date	01/14/2025	
Exit Reason	Select	▼
Destination	Select	▼
Exit Comment	<hr/>	
DISABLING CONDITIONS AND BARRIERS		
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼
MONTHLY INCOME AND SOURCES		
Income from Any Source	No	▼

Program Exits: Exit Form

- > Program Exit Date is the date that the client exited from the program
- > Exit Reason is the precipitating event that directly led to the client leaving the program
- > Destination is where the client is residing upon exiting the program
- > Most information will automatically populate from the client's enrollment screen
 - > *Be sure to read through the responses to confirm that the information is still accurate for the client*

Reporting

Reports Library



REPORT LIBRARY	
Favorite Reports	0 report(s) ▾
HUD Reports	7 report(s) ▾
Data Quality Reports	6 report(s) ▾
Service Based Reports	13 report(s) ▾
Program Based Reports	19 report(s) ▾

- > Contains ready made or “canned” reports
- > To access, click the Reports icon from the Launchpad.
- > Ability to “Favorite” reports

Program Roster Report

---> [GNRL-106] Program Roster

- > Found in Reports Library under Program Based Reports
- > Lists program stay and relevant household information for selected program(s)
- > Useful in ensuring program rosters, enrollments, and exits are reflected accurately the database
- > Helpful to run for Active clients within a particular reporting timeframe



Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
<i>Program: THP Plus Together We Can</i>												
Munster, Henrietta	E3C2C4530	04/04/1994	30	30	01/14/2025	-	1		0	0	0	H. Aversano
Baggins, Frida	337A18C03	03/03/1939	85	85	01/01/2025	-	14		0	0	0	H. Aversano
Wise, Sam	A07FA1773	02/02/1972	52	52	01/01/2025	-	14		0	0	0	H. Aversano
Fish, Goldie	D8A09E9B9	03/03/1993	31	31	12/24/2024	01/14/2025	21		0	0	0	H. Aversano

Bitfocus Resources

ONE System Website:

---> onesf.clarityhs.com

ONE System Help Site:

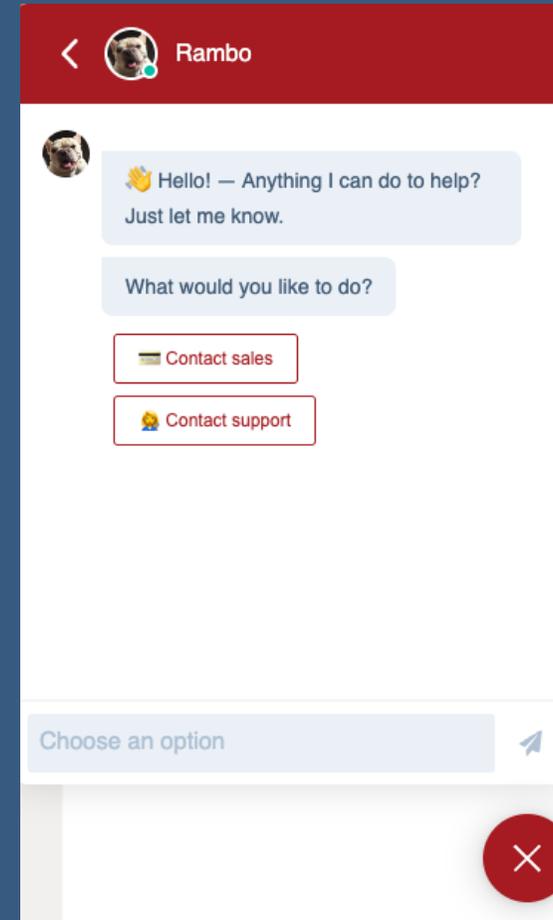
---> onesf.bitfocus.com

Bitfocus Help Desk

---> onesf@bitfocus.com

---> 415.429.4211

Help Desk Widget (On ONESF Help Center Website and Bitfocus Help Site)



Questions?